PPLA End User Training Manual

Version 2

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Introduction

Welcome to the South Dakota Board of Regents Employment Opportunities On-Line System. The Board of Regents has implemented this system in order to automate many of the paper-driven aspects of the employment application process as well as the position description and compensation review process.

Overview

The system is designed to benefit you by facilitating:

- Faster processing of employment information,
- Up-to-date access to information regarding all of your requisitions, and
- More detailed screening of applicants' qualifications – before they reach the interview stage

The Human Resource (HR) department has provided these training materials to assist with your understanding and use of this system.

Your Web Browser

The Employment Opportunities On-Line System is designed to run in a web browser over the Internet. The system supports browser versions of Internet Explorer 4.0 and above. However some of the older browser versions are less powerful than newer versions, so the appearance of certain screens and printed documents may be slightly askew. Please notify the system administrator of any significant issues that arise.

The site also requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com.

It is recommended that you do not use your browser's "Back", "Forward" or "Refresh" buttons to navigate the site, or open a new browser window from your existing window. This may cause unexpected results, including loss of data or being logged out of the system. Please use the navigational buttons within the site. The site is best viewed in Internet Explorer 5.5 and above.

Security of Data

To ensure the security of the data provided by applicants and employees, the system will automatically log you out after 60 minutes if it detects no activity. However, anytime you leave your computer we strongly recommend that you save any work in progress and logout of the system by clicking on the logout link located on the bottom left side of your screen.

Training Site
A training site has been created to assist you in better understanding the applications of the On-line Employment System.  http://training202.peopleadmin.com (for applicants) and http://training202.peopleadmin.com/hr (for employees).  The following roles for this training site include:

CSA Employee – Sample (first name) CSA Employee (last name)
User ID = CSAEmployee
Password = Password

NFE Employee – Sample (first name) NFE Employee (last name)
User ID = NFEEmployee
Password = Password

Budget – Sample (first name) Budget (last name)
User ID = BudgetAnalyst
Password = Password

Hiring Manager Assistant – Sample (first name) HMAssistant (last name)
User ID = HMAssistant
Password = Password

Hiring Manager – Sample (first name) Hiring Manager (last name)
User ID = Hiring Manager
Password = Password

Dean/Department Head – Sample (first name) DN-DeptHead (last name)
User ID = DN-DeptHead
Password = Password

Administrator – Sample (first name) Administrator (last name)
User ID = Administrator-VP
Password = Password

Institutional Human Resources – Sample (first name) Institutional HR (last name)
User ID = Institutional HR
Password = Password

BOR Human Resources – Sample (first name) BOR Human Resources (last name)
User ID = BORHumanResources
Password = Password

Chief Executive Officer – Sample (first name) Institutional Chief Executive Officer (last name)
User ID = ChiefExOfficer
Password = Password

Committee Chair – Sample (first name) CSA Committee Chair (last name)
User ID = CSAComChair
Password = Password

**Intended Audience**
This manual is for end users of Your Future, this includes all SDBOR employees, Human Resources, Budget, Hiring Managers, Administrators, Deans, Committee Chairs and Presidents.

**Documentation and Disclaimer**
All information that is entered into this system must be free of discriminatory intent. All information used for a position should be reflective of the position not of the individual in the position. It is the policy of the South Dakota Board of Regents to take affirmative action and to ensure that all employment practices are free of discrimination. In addition, the Board of Regents fully supports incorporation of non-discrimination and Affirmative Action rules and regulations into all of its employment practices. South Dakota Board of Regents is an equal employment opportunity employer.
Glossary for Position Description Module

Terms Related to Career Service:

Audit Notes: A narrative produced by the campus HR representative which provides a brief summary of the job duties as well as comparisons to the class specifications. A summary statement at the end provides the BOR HR Director with a campus classification recommendation for final approval.

Class specifications: A general description of job duties, responsibilities, and levels of authority and decision-making. These are developed and maintained by the Bureau of Personnel. These are used as criterion for campuses to determine appropriate classification and subsequently pay grade and compensation levels.

CSA: acronym for Career Service Act. Career Service Employees are employees that are provided for under SDCL 3-6A-13, which applies to all positions in the executive branch of state government. The only exceptions to the Career Service Act (CSA) for the Board of Regents System would include division directors, deputy division directors, and supervisors who determine and publicly advocate substantive program policy, persons who provide legal counsel, and confidential assistants to exempt employees; presidents, deans, administrative and policy-making positions, student health service physicians, teaching and professional research positions under the jurisdiction of the State Board of Regents and other directors or administrative policy-making positions of such institutions as determined by the personnel commissioner; heads of, teachers, and medical physicians of, the several institutions under the jurisdiction of the executive branch and other administrative and policy-making positions of such institutions as determined by the personnel commissioner.

CSA Essential Duties: A shortened description of the duties of the specific position to include the breakout of essential verses secondary job functions. This will also include other requirements to assist in meeting ADA compliance.

Job Audit: A meeting between the employee and a HR representative to review the PDQ, observe job duties and responsibilities, and discuss typical decisions, authority level, scope, independence, and role of the individual performing the job duties.

PDQ: acronym for Position Description Questionnaire. This is the document that CSA staff members (and their supervisors) must complete to initiate a reclassification process. Additionally, this is the same document that a supervisor would complete on a new or vacant position.
Reclassification: A change in the class title of a position caused by a change in the duties and responsibilities of a position involving either the addition of new assignments or the deletion or modification of existing assignments.

**Terms Related to Faculty:**

**COHE:** Council of Higher Education is the recognized faculty union.

**Non-Unit:** Non-Unit Faculty are employees that are in faculty related positions who are exempt from the State Career Service System and exempt from the bargaining unit (COHE) and perform research, instruction, and other faculty duties. Departments that are exempted from the COHE collective bargaining agreement are Medical School, Law School, Institute of Atmospheric Sciences, and 2010 Research Initiative.

**Unit:** Unit Faculty are employees that are in faculty related position who are exempt from the State Career Service System and perform research, instruction, and other faculty duties. These employees are members of the Council of Higher Education (COHE) which have a collective bargaining agreement (CBA) and are the recognized union representatives.

**Tenure Appointment:** A tenure contract entitles the faculty member to continued contracts until the employment relation is terminated by retirement, through a reduction in force, or is discharged for cause.

**Tenure Track Contract:** Appointment is a regular appointment of a qualified faculty member whose time will accrue toward tenure status, a status which, if obtained, assures a faculty member of a continuing appointment subject to conditions outlined in the collective bargaining unit or in accordance with BOR policy.

**Term Contract:** Part-time or full-time contract for a definite term not to exceed one year or overlap two fiscal years; terminates at the end of the term.

**Terminal Degree:** The highest degree granted in a discipline, usually a Ph.D. or in education an Ed.D. Possession of a terminal degree typically implies that the individual has demonstrated an ability to perform original scholarship or research in his or her discipline. First professional degrees in law, medicine, and Masters of Fine Arts are treated as terminal degrees in those academic programs.

**Terms Related to Non-faculty Exempt:**

**Compensation Review:** The process by where a supervisor or HR requests that an employee’s duties be reviewed to ensure accurate internal equity.

**NFE:** acronym for Non-Faculty Exempt. Non-Faculty Exempt are employees that are not faculty but are exempt from the State Career Service System. These are employees who perform administrative and professional functions.
**NFE Essential Duties:** A shortened description of the duties of the specific position to include the breakout of essential verses secondary job functions. This will also include other requirements to assist in meeting ADA compliance.

**NFE Position Description Questionnaire (NFE PDQ):** This is the document that NFE staff members (and their supervisors) must complete to initiate a compensation review of their position. Additionally, this is the same document that a supervisor would complete on a new or vacant position.

**Other Related Terminology:**

**Exempt from Overtime:** A position classified under FLSA which does not accrue overtime.

**FTE:** acronym for Full Time Equivalent. FTE is a number which designates staffing level where one full-time equivalent position is equal to the number of days, Monday through Friday, in a fiscal year, multiplied by eight hours per day. It excludes: paid overtime hours; hours paid to an employee assigned to a light duty position as approved by the commissioner of the Bureau of Personnel due to a temporary partial disability as defined in subdivision 62-1-1(8); hours paid for accumulated annual leave and sick leave upon employee termination; hours paid to patient employees of the institutions under the control of the Department of Human Services and the Department of Military and Veterans Affairs; hours paid to work-study students enrolled in postsecondary educational institutions or postsecondary students employed pursuant to chapter 3-6B; and hours paid to members of boards and commissions pursuant to §4-7-10.4. For purposes of salary computation a nine month or more per year full-time teaching or research faculty person, or the equivalent thereof, at the institutions under the jurisdiction of the Board of Regents shall be considered one full-time equivalent.

**Nonexempt from Overtime:** A position classified under FLSA as eligible to accrue overtime.

**Part-time Employee:** A part-time employee is an employee who works fewer than twenty (20) hours per workweek. A part-time employee may be exempt or nonexempt and is not eligible for benefits.

**Position Number:** Assigned for all positions having salary and FTE budgeted.

**Regular Full-time Employee:** In accordance with SDCL § 2-14-2(12), a regular full-time employee is an employee who is employed by the agency to work a predetermined schedule of at least forty (40) hours per normal workweek. A regular full-time employee may be exempt or nonexempt and is eligible for benefits.

**Regular Part-time Employee:** A regular Part-time Employee is an employee who regularly works fewer than forty (40) hours per week but more than twenty (20) hours per week. A regular part-time employee may be exempt or nonexempt and is eligible for certain benefits.

**Seasonal or Temporary Employee:** A seasonal or temporary employee is an employee who is employed by the agency for a specified period of time or for the duration of a specified and definable project. A seasonal or temporary employee may be exempt or nonexempt and may or may not be eligible for benefits.
**Terms related to the On-line Employment System Roles:**

**Administrator:** These are individual(s) that perform the responsibility of a Vice President or Institutional Chief Executive Officer.

**BOR HR:** This individual performs the functions of Human Resources at the Board of Regents.

**Budget:** These are individual(s) that perform budgetary functions in reviewing salary and FTE.

**CSAAppealComChair:** These are individual(s) that perform human resource functions at the institution and also have a role in the On-line Employment System as Institutional Human Resources. The Committee Chair will chair the appeal hearing.

**CSA Employee:** These are individual(s) that are employed as Career Service Employees.

**Dean/Dept Head:** These are individual(s) that perform the responsibilities of either a Dean or Department Head of a division, college or department.

**Hiring Manager:** These are individual(s) that perform the responsibilities of a supervisor of a department and/or a sub-division of a department. These employees actually recruit and supervise the day-to-day positions within a given area. They will have the ability to modify, create, and recruit for the institution.

**Institutional Chief Executive Officer:** These are individual(s) that perform the responsibility the Institutional Chief Executive Officer.

**Institutional Human Resources:** These are individual(s) that perform the responsibilities of the human resources department. All HR personnel will have this role.

**NFE Employee:** These are individual(s) that are employed as Non-faculty Exempt Employees.

**Terms related to the On-line Employment System Workflow:**

**CSA Establish a New Action:** This action is primarily for hiring managers to establish a new CSA position that currently does not exist.

**CSA Employee Update/Review a Position:** This action is primarily for CSA employees to review current CSA positions and update the position as applicable to ensure the position of record reflects the current duties performed.

**CSA Institutional Update/Review a Position:** This action is primarily for hiring managers to review current CSA positions and update the position as applicable to the departmental or institutional needs.
**CSA Recruit an Existing Position:** This action allows the hiring manager to recruit a CSA position that exists without having to go through the workflow of creating or updating a position.


**Faculty Recruit New Position:** This action allows the hiring manager to recruit a new faculty position that currently does not exist. This will need to go through the appropriate workflow of creating a new position.

**Faculty Recruit Existing Position:** This action allows the hiring manager to recruit a faculty position that exists without having to go through the workflow of creating or updating a position.

**Inactivate Position Description:** This action is primarily used by hiring managers and by human resources to inactivate a position description that no longer is being used.

**Modify User Access to a Position Description:** This action is primarily used by hiring managers and by human resources to modify user access to a position description base upon departmental and institutional needs.

**NFE Establish a New Action:** This action is primarily for hiring managers to establish a new NFE position that currently does not exist.

**NFE Employee Update/Review a Position:** This action is primarily for NFE employees to review current NFE positions and update the position as applicable to ensure the position of record reflects the current duties performed. In order for this action to work, hiring managers must initiate the action. Written communication is then submitted to the employee for their review and update.

**NFE Institutional Update/Review a Position:** This action is primarily for hiring managers to review current NFE positions and update the position as applicable to the departmental or institutional needs.

**NFE Recruit an Existing Position:** This action allows the hiring manager to recruit an NFE position that exists without having to go through the workflow of creating or updating a position.
Rule, Validation, Maintenance Forms

Rule, validation and maintenance forms do not apply to this manual.
Business Process

You will use this system to:

- **Update Position Descriptions Online**: Allow departmental or agency managers to review and update position descriptions online.
- **Search Position Descriptions**: Allow the Classification/Compensation staff to review and compare both current and archived position descriptions using a variety of search options.
- **Processing of Change Requests**: Departmental or agency managers can submit requests for position review through the appropriate approval channels online. Classification/Compensation staff will be able to complete reviews and record justifications online.
- **Processing of Salary Recommendation Form**: Departmental or agency managers can submit salary recommendation online as applicable upon selection of a new hire through the On-line Employment System Applicant Tracking Module.
- **Communication**: Managers will review the status of their change requests online. In addition, employees can access their current position description.
- **Job Requisition Creation**: When used in conjunction with the On-line Employment System Applicant Tracking Module, managers can easily convert position descriptions into job requisitions when a position becomes vacant.
- Submit job requisitions electronically,
- Collect employment application materials online for all positions, including career service, non-faculty exempt, and faculty positions,
- Screen applicants using Job-Specific Qualification Questions,
- Route applicants to the appropriate hiring manager/search committee via the web,
- Provide automated updates to applicants regarding the status of their application, and
- Notify applicants of new positions that match their skill and interest areas.

Position Description options are broken down into different actions in the online system by classification. Not all “users” will have access to all actions. The actions will be available due to your role and classification with the organization. You will find a description of each of the following actions in the **Glossary**. Typical options may include:

- Establish a New Position
- Employee Update/Review a Position
- Institutional Update/Review a Position
- Recruit Existing Position
- CSA Appeal Process

To begin a position description action, click the “Begin New Action” link in the Job Description section of the navigation bar. Your action choices will then appear.

**Important Tips**

Fields with an Asterisk (*) are required, so if you do not include information in the field, an error message will appear and you will be required to complete it. In the field under the field name, there may be a hyperlink. This hyperlink provides the employee additional help on the field.
A Position Description is only saved when an employee clicks on the “Save and Stay on this Page”. This selection will save the position description at the same status within the system without continuing to the next page. However, if an employee does not save the position description before exiting or upon completion, it will **Not Be Saved**. Therefore, upon completion of the final step, the employee will be prompted with a cancel or confirm option. To save, the employee must click Confirm.
Processes

Establishing a New Position

1. Establish a New Position – Hiring Managers, Dean & Department Heads Only (CSA)

Hiring Managers, Deans and Department Heads who would like to establish a new position must click on the ‘Begin New Action’ link under Job Descriptions on the far left of the screen. Once selected, select the ‘CSA-1. Establish a New Position’. For those Dean/Department Heads who would need to review a pending request of a new position, select ‘View Pending’ then select the position in the body of the web page.

Hiring Managers

Administrator/Dean/Department Head
For CSA positions, there are eight tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA Summary report to review the position description.

**Tab One: Duplicate Position**

This screen allows the hiring manager to select a past or current position to duplicate to start the position description with information on a similar position. This allows the hiring manager the ability to populate some of the PDQ with information so not to start from a blank slate.

**Tab Two: Requisition Form**

This screen allows the hiring manager to identify the overall purpose, requested advertisement, and demographics of the position.

**Tab Three: Available Funding Source**

This screen allows the hiring manager to identify the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position.

To add available funding sources to your Position Description, click on the “Add New Entry” button at the bottom of the tab. Once you select “Add New Entry”, you will be able to populate the appropriate fields for funding.

You will be able to add as many funding sources as needed for this particular position. The available funding percentages MUST total 100%.

Select “Add Entry” to tie the funding source to the position.
Tab Four: Personal and Organizational Data
This screen allows the hiring manager to identify the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description. **Important** - there is a requirement to complete the Employee’s User Account. If this position is vacant, select “vacant”. In addition, there is a need to complete the Supervisor’s User Account. This must have the supervisors name to ensure that the supervisor has access to the position. If the supervisor is inaccurately assigned, then the actual supervisor will not be given access to this position.

Tab Five: Duties
The “Duties” of a Position Description are the major responsibilities the incumbent in this position performs on a routine basis. There are two types of duties: essential and secondary duties. *Essential* duties are those that MUST be performed by the incumbent in the position.

To add duties to your Position Description, click on the “Add New Entry” button at the bottom of the tab.

After clicking the “Add New Entry” button, you should see a form similar to this one:

![Add New Entry Form]

You will be able to add as many duties as needed for this particular position. For each duty you add, you should add a description of the duty per the questions asked on the form. **The duty percentages MUST total 100%**. The more detailed the description and explanation by the employee, the better review the institutional human resources can complete. When human resources review these duties, they will assess the nature of the duty and assign as essential or secondary.

Once you are finished entering your duties, you’ll see a screen similar to the following:

![Duty Screen]

You will notice that a duty can always be edited by selecting, edit or it can be deleted.
You may click the “Continue to Next Page” button to go to any additional tabs.

It is also important to note that you may click the “Save and Stay On This Page” button at any time in order to save your position description for completion at a later date or to send for approval.

Tab Six: General Information

This screen allows the hiring manager to identify the responsibility, supervision, contacts, and funding authority for this position.

Tab Seven: Position Information

This screen allows the hiring manager to identify the complexity of this position as well as identify if any duties came from a different position. The hiring manager will want to identify the knowledge, skills and abilities that are necessary for an applicant to effectively perform the duties of this position.

Tab Eight: Action History

This screen allows the hiring manager to provide additional documentation pertinent to the position. The hiring manager must type in the information and select ‘Add Note”. This data will not be saved unless confirmed by the author to add.

Submitting the Position Description

After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. You should see a screen similar to the following. Scroll down through this screen to review the information you entered. You will then select the appropriate action to move it through the next appropriate workflow.

Once selecting the appropriate action statuses, click the Continue button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page.
Click **Confirm** to complete this step.

The details of your position description are NOT SAVED until you complete this step.

**2. Establish a New Position – Hiring Managers, Dean and Department Heads Only (NFE)**

Hiring Managers, Deans and Department Heads who would like to establish a new position must first ensure that they are logged in under the proper user type which is indicated at the top of the page near his/her name. User type can be changed in the left-hand navigation bar by selecting “Change User Type”. click on the ‘Begin New Action’ link under Job Descriptions on the far left of the screen. Once selected, select the ‘NFE-1. Establish a New Position’.

For those Dean/Department Heads who would need to review a pending request of a new position, select ‘Pending Actions’ then select the position in the body of the web page.

The user can then click on the ‘Begin New Action’ link under Job Descriptions on the far left of the screen. Once selected, select the ‘NFE-1. Establish a New Position’. For those Dean/Department Heads who would need to review a pending request of a new position, select ‘Pending Actions’ then select the position in the body of the web page.
For NFE, there are ten tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the NFE Summary report to review the position description.

**Tab One: Duplicate Position**

This screen allows the hiring manager to select a past or current position to duplicate to start the position description with information on a similar position. This allows the hiring manager the ability to populate some of the PDQ with information so not to start from a blank slate.
Tab Two: Requisition Form

This screen allows the hiring manager to identify the overall purpose, requested advertisement, and demographics of the position.

Tab Three: Available Funding Source

This screen allows the hiring manager to identify the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position.

To add available funding sources to your Position Description, click on the “Add New Entry” button at the bottom of the tab. You will be able to add as many funding sources as needed for this particular position. The available funding percentages MUST total 100%.

Tab Four: Personal and Organizational Data

This screen allows the hiring manager to identify the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description. Important - there is a requirement to complete the Employee’s User Account. If this position is vacant, select “vacant”. In addition, there is a need to complete the Supervisor’s User Account. This must have the supervisors name to ensure that the supervisor has access to the position. If the supervisor is inaccurately assigned, then the actual supervisor will not be given access to this position.

Tab Five: Purpose of Position

This screen allows the hiring manager to identify the purpose of the position. In this tab, the hiring manager must identify the education, experience, and supervisory responsibility.

Tab Six: Problems and Decisions

This screen allows the hiring manager to identify the position needs for problem solving, decision making, and impact on the organization of decisions made.

Tab Seven: Working Contacts

This screen allows the hiring manager to identify the types of contacts and/or constituencies that this position works with on a daily, weekly, monthly basis.

Tab Eight: Other

This screen allows the hiring manager to identify the type of working environment that the position works (Environment, Working Hours, and Travel required).

Tab Nine: Job Functions

The “Job Functions” of a Position Description are the major responsibilities the incumbent in this position performs on a routine basis. Essential duties are those that MUST be performed by the incumbent in the position.
To add duties to your Position Description, click on the “Add New Entry” button at the bottom of the tab. You will be able to add as many duties as needed for this particular position. For each duty you add, you should add a description of the duty per the questions asked on the form. The duty percentages MUST total 100%. The more detailed the description and explanation by the employee, the better review the institutional human resources can complete. When human resources review these duties, they will assess the nature of the duty and assign as essential or secondary.

Once you are finished entering your duties, you’ll see a screen similar to the following:

You will notice that a duty can always be edited by selecting, edit or it can be deleted. You may click the “Continue to Next Page” button to go to any additional tabs. It is also important to note that you may click the “Save and Stay On This Page” button at any time in order to save your position description for completion at a later date or to send for approval.

Tab Ten: Action History
This screen allows the hiring manager to provide additional documentation pertinent to the position. The hiring manager must type in the information and select ‘Add Note”. This data will not be saved unless confirmed by the author to add.
Submitting the Position Description

After clicking the **Continue to Next Page** button from the previous screen and viewing any notes associated with the position description, click on the **Continue to Next Page** or **Preview Action** buttons. You should see a screen similar to the following. Scroll down through this screen to review the information you entered.

The last step is to select one of the choices and click the **Continue** button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page.

Click **Confirm** to complete this step.

**The details of your position description are NOT SAVED until you complete this step.**
3. Establish a New Position – Administration Only (CSA and NFE)

Administrators who would like to process a new position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For CSA and NFE, there are three tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA and NFE Summary report to review the position description.
Tab One: Requisition Form
The first tab will be “Requisition Form”. This screen allows the administrator to review the overall purpose, requested advertisement, and demographics of the position. The administrator can make changes to the requisition if applicable.

Tab Two: Available Funding Source
The second tab will be “Available Funding Source”. This screen allows the administrator to review and modify if necessary the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position. This will assist the administrator in understanding where the funding is coming.

Tab Three: Action History
This provides a historical review of all actions that have occurred with this position and allows for the administrator to post any additional documentation as applicable by inserting it in the notes and selecting ‘Add Notes’. The administrator will need to confirm the note to ensure posting.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. If there are changes that you think need to be made, return the position to the Hiring Manager, if you approve, select “Send to Inst HR”.

Select Continue then on the next page select Confirm.
4. Establish a New Position – Institutional Human Resources Only (CSA)

HR staff who would like to process a new position must click on the ‘View Pending’ option under the Position Descriptions header on the left navigation bar; then select the position in the body of the page that is being reviewed. HR may also create a position by selecting ‘Begin New Action’ and selection the ‘CSA-1. Establish a New Position’ Option.

For CSA, there are eleven tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA Summary report to review the position description.

Tab One: Duplicate Position

This screen allows HR to select a past or current position to duplicate to start the position description with information on a similar position. This allows HR the ability to populate some of the PDQ with information so not to start from a blank slate.
Tab Two: Assign Classification Title
This tab allows the human resource representative to associate a specific classification title with the Position Description being created. Search for the appropriate classifications, select a title from the dropdown list. After searching for the title, click on the ‘Select Title and Continue’ link to associate this specific title with the proposed Position Description. If you do not click on the ‘Select Title and Continue’, the position class will not move forward with the position description.

Tab Three: HR Use Only
This tab allows HR to provide a complete audit for the position. The Summary and Recommendations should include the overall findings. Each audit note field below should house the substantiating documentation to support the summary. The Position Number, FLSA and EEO fields must be completed by HR prior to moving to the next tab.

Tab Four: Requisition Form
This screen allows the institutional human resources representative to review the overall purpose, requested advertisement, and demographics of the position.

Tab Five: Available Funding Source
This screen allows the institutional human resources to review the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position. To add or change a current funding source you can select “View, Edit, Delete” or to enter in new funding sources choose Add New Entry.

Tab Six: Personal and Organizational Data
This screen allows human resources to review the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description. Important - there is a requirement to complete the Employee’s User Account. If this position is vacant, select “vacant”. In addition, there is a need to complete the Supervisor’s User Account. This must have the supervisors name to ensure that the supervisor has access to the position. If the supervisor is inaccurately assigned, then the actual supervisor will not be given access to this position.

Tab Seven: Duties
The “Duties” of a Position Description are the major responsibilities the incumbent in this position performs on a routine basis. There are two types of duties: essential and secondary duties. Essential duties are those that MUST be performed by the incumbent in the position. On this tab, human resources will need to identify if the duty is essential or secondary. Human resources may modify the language to best represent the duty as it will flow into the description but HR may not change the intent of the position description. Human resources will not have the option to modify the job description; therefore, HR must review the duties to ensure compliance with state and federal laws.

Tab Eight: General Information
This screen allows human resources to review the responsibility, supervision, contacts, and funding authority for this position.
Tab Nine: Position Information
This screen allows human resources to review the complexity of this position as well as identify if any duties came from a different position. The hiring manager should have identified the knowledge, skills and abilities that are necessary for an applicant to effectively perform the duties of this position. Human resources will want to ensure that this is accurate to ensure compliance with the Americans with Disability Act and other federal laws.

Tab Ten: Working Conditions
The tenth tab, ‘Working Conditions’ is a tool that assists the institutional human resources department to work with the supervisor/hiring manager in identifying the essential physical and environmental demands of the position. This will assist in ensuring that the position complies with the American with Disabilities Act, State Workers Compensation, and the Family Medical Leave Act.

Tab Eleven: Action History
This provides a historical review of all actions that have occurred with this position. Should human resources need additional information added to the position; human resources can add information into the notes section by writing and clicking on ‘add notes’. Notes will not be saved unless confirmed.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once you have reviewed the position description, you can then make your selection on how you would like to continue. You will have a variety of routes to send it, it will depend on the workflow for your campus how the position description must be routed. Make your selection and choose Continue. You will then be taken to one more screen to either confirm or cancel the action. The action will not be submitted unless you select Confirm.

5. Establish a New Position – BOR Human Resources Only (CSA)
BOR HR staff who would like to process a new position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed. BOR HR may also create a position by selecting ‘Begin New Action’ and selecting the ‘CSA-1. Establish a New Position’ Option.

For CSA, there are two tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA Summary report to review the position description.
Tab One: BOR HR Use Only
This tab allows BOR HR to provide comments on the complete audit and position description summary for the position.

Tab Two: Action History
This provides a historical review of all actions that have occurred with this position. BOR HR may select to write comments in the ‘notes’ if they feel additional information is warranted.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. You should see a screen similar to the following. Scroll down through this screen to review the information you entered.

*Notice
Notification will be submitted to institutional human resources as to the position approval or denial from BOR HR.

6. Establish a New Position – Human Resources Only (NFE)
HR staff who would like to process a new position must click on the ‘Pending Actions’ option under the Position Descriptions header on the left of the site; then select the position in the body of the page that is being reviewed. HR may also create a position by selecting ‘Begin New Action’ and selection the ‘NFE-1. Establish a New Position’ option.

For NFE, there are thirteen tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the NFE Summary report to review the position description.
Tab One: Duplicate Position
This screen allows HR to select a past or current position to duplicate to start the position description with information on a similar position. This allows HR the ability to populate some of the PDQ with information so not to start from a blank slate.

Tab Two: Assign Classification Title
This tab allows you to associate a specific classification title with the Position Description being created. Search for the appropriate classifications, select a title from the dropdown list. After searching for the title, click on the ‘Select Title and Continue’ link to associate this specific title with the proposed Position Description. If you do not click on the ‘Select Title and Continue’, the title will not move forward with the position description.

Tab Three: HR Use Only
This tab allows HR to provide a complete audit for the position. The Summary and Recommendations should include the overall findings. Each audit note field below should house the substantiating documentation to support the summary. The Position Number, FLSA, and EEO fields must be completed.

Tab Four: Requisition Form
This screen allows the institutional human resources representative to review the overall purpose, scope of the search, appointment type, requested advertisement, and demographics of the position.

Tab Five: Available Funding Source
This screen allows the institutional human resources to review the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position.
Tab Six: Personal and Organizational Data
This screen allows human resources to review the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description. Important - there is a requirement to complete the Employee’s User Account. If this position is vacant, select “Vacant”. In addition, there is a need to complete the Supervisor’s User Account. This must have the supervisors name to ensure that the supervisor has access to the position. If the supervisor is inaccurately assigned, then the actual supervisor will not be given access to this position.

Tab Seven: Purpose of Position
This screen allows human resources to review the purpose of the position. In this tab, human resources will want to review the education, experience, and supervisory responsibility as they will carry over to the job description. Human resources will want to ensure that the position description complies with federal and state laws.

Tab Eight: Problems and Decisions
This screen allows human resources to review the position needs for problem solving, decision making, and impact on the organization of decisions made.

Tab Nine: Working Contacts
This screen allows human resources to review the types of contacts and/or constituencies that this position works with on a daily, weekly, monthly basis.

Tab Ten: Other
This screen allows the human resources to review the type of working environment that the position works (Environment, Working Hours, and Travel required).

Tab Eleven: Job Functions
There are two types of duties: essential and secondary duties. Essential duties are those that MUST be performed by the incumbent in the position. On this tab, human resources will need to identify if the duty is essential or secondary. Human resources may modify the language to best represent the duty as it will flow into the description but HR may not change the intent of the position description. Human resources will not have the option to modify the job description; therefore, HR must review the duties to ensure compliance with state and federal laws.
Tab Twelve: Working Conditions
This tab is a tool that assists human resources to work with the supervisor/hiring manager in identifying the essential physical and environmental demands of the position. This will assist in ensuring that the position complies with the American with Disabilities Act, State Workers Compensation, and the Family Medical Leave Act.

Tab Thirteen: Action History
This provides a historical review of all actions that have occurred with this position. In the event human resources need to identify additional documentation, then they will need to insert it in the notes section by writing and selecting ‘Add Notes’. To ensure the note is saved in the position description, human resource must click confirm.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. You should see a screen similar to the following. Scroll down through this screen to review the information you entered, then you can select what Action Status you need to use, select Continue. On the next screen select Confirm, the action will not be submitted unless you select Confirm.

7. Establish a New Position – Budget Only (CSA or NFE)
Budget staff who would like to process a new position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For both NFE and CSA, there are three tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”.

Pending Actions

<table>
<thead>
<tr>
<th>Record</th>
<th>Working Title</th>
<th>Proposed Title</th>
<th>Organization</th>
<th>Position Number</th>
<th>Apt Type</th>
<th>Employee Last Name</th>
<th>Status</th>
<th>Action Type</th>
<th>Date Updated</th>
</tr>
</thead>
<tbody>
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<td>1</td>
<td>Recycling Specialist</td>
<td>RJIT</td>
<td>IT</td>
<td>Item</td>
<td>Item</td>
<td>Item</td>
<td>Item</td>
<td>Item</td>
<td>Item</td>
</tr>
</tbody>
</table>

Welcome
Your Current Group: Budget.

Thursday, January 26, 2010
Tab One: Requisition Form
This screen allows the budget staff to identify the overall percent of effort for this position. Specifically, Budget will be able to identify the percent FTE, the contract dates for that current year, and total months of employment for the position.

Tab Two: Available Funding Source
This screen allows the Budget staff to identify the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position.

Tab Three: Action History
This provides a historical review of all actions that have occurred with this position. This provides Budget the ability to add notes in the event justification is required or if the receiver needs clarification of what to report.

Submitting the Position
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. You should see a screen similar to the following. Scroll down through this screen to review the information you entered.

When selecting the appropriate chain of command Budget will need to send it to the appropriate individual based on the funding needs. Select your action status and then choose Continue. On the next screen you MUST choose Confirm for the action to be submitted.

CSA Employee Review/Update a Position
Notification of the classification review will be submitted to Institutional Human Resources as to the classification approval or denial from BOR Human Resources. Employee will be notified by the Institutional Human Resources and by email notification through the On-line Employment system. This notification will have the date for the appeal process for Step Four (4) of the appeal process ONLY. All other timelines are up to the employee/administration to meet. The employee/administration will have
a finite amount of time to respond to policy timelines. Please see the appropriate BOR Policy for timelines and guidance on this process. BOR Policy 4.9 can be found at the following URL http://www.sdbor.edu/policy/4-Personnel/documents/4-9.pdf or it can be found on the left side tool bar near the bottom.

CSA employee who would like to review a position must click on the ‘Begin New Action’ option under the Job Description header on the left of the site; then select Start Action on the ‘CSA- 2. Employee Update/Review a Position’ option. On the next screen the CSA employee will have to select his/her position to update.

1. Employee Review/Update a Position – CSA Employees Only

For CSA, there are four tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”.

Tab One: Personal and Organizational Data
This screen allows the employee to propose a classification title and identify position demographics (such as hours of work).

Tab Two: Duties
The “Duties” of a Position Description are the major responsibilities the incumbent in this position performs on a routine basis. There are two types of duties: essential and secondary duties. Essential duties are those that MUST be performed by the incumbent in the position. To add duties or edit duties to your Position Description, click on the “Add New Entry” from the bottom of the pager or select “edit” under the percentage.

You will be able to add or edit as many duties as needed for this particular position. For each duty you add, you should add a description of the duty per the questions asked on the form. The duty percentages MUST total 100%.

You may click the “Continue to Next Page” button to go to any additional tabs.
It is also important to note that you may click the “Save and Stay On This Page” button at any time in order to save your position description for completion at a later date or to send for approval.

Tab Three: General Information
This screen allows the employee to identify the responsibility, supervision, contacts, and funding authority for this position.

Tab Four: How Has This Job Changed
This screen allows the employee to identify how the position has changed. Employees will want to be specific and clearly identify what has changed and how in this section. This is also where the employee can explain why the position has changed, the increased difficulty of the position, if the changes are temporary or permanent, and provide reason for why the PDQ is being submitted.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page buttons. You should see a screen similar to the following. Scroll down through this screen to review the information you entered.

The last step is to select one of the choices and click the Continue button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page.
Click **Confirm** to complete this step. The details of your position description are NOT SAVED until you complete this step.

2. **Employee Review/Update a Position – Hiring Managers - CSA Employees Only**

Hiring Managers who would like to review position that was submitted by an employee must click on the ‘Pending Actions’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For CSA, there are four tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA Summary report to review the position description.

**Tab One: Available Funding Source**

This section is for Hiring Managers and Budget. Hiring managers complete the funding information to identify funding source information. Explanatory details may be inserted into the ‘Hiring Manager Comments’ text box. Here the hiring manager can add the fund, org, account, program, activity, percent,
and comments. Please add separate entries for each funding source. Hiring managers should discuss any questions they may have with their Budget Department.

**Tab Two: Position Information**
This screen allows the hiring manager to review the complexity of this position as well as identify if any duties have changed and come from a different position. The hiring manager will want to ensure that the knowledge, skills and abilities are reflected for the position and incumbent to effectively perform the duties of this position.

**Tab Three: Request for Position Classification/Pay Grade Review**
This screen allows the hiring manager to review the current classification and provide a recommendation of a proposed classification. The hiring manager will also want to identify the justification for such a proposed title. Proposed titles do not guarantee a change in the classification but provide additional supporting information from the hiring manager’s perspective.

**Tab Four: Action History**
This provides a historical review of all actions that have occurred with this position. The hiring manager may select to write comments in the ‘notes’ if they feel additional information is warranted.

**Submitting the Position Description**
After clicking the **Continue to Next Page** button from the previous screen and viewing any notes associated with the position description, click on the **Continue to Next Page** or **Preview Action** buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action. This is where the hiring manager can select to send the position on to Inst HR, cancel the action, save the action to return to later or send it back to the employee for changes. Select **Continue** to be taken to the confirmation page.

Click **Confirm** to complete this step.

**The details of your position description are NOT SAVED until you complete this step.**

HR staff who would like to process a position must click on the ‘Pending Actions’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For CSA, there are eleven tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA Summary report to review the position description.

**Tab One: Assign Classification Title**

This screen allows institutional HR to review the Title Details of the position, including: type of position, classification title, position class, and pay grade. This tab allows HR to associate a specific classification title with the Position Description being created. Search for the appropriate classifications, select a title from the dropdown list. After searching for the title, click on the ‘Select Title and Continue’ link to associate this specific title with the proposed Position Description. If you do not click on the ‘Select Title and Continue’, the position class will not move forward with the position description.

**Tab Two: HR Use Only**

This tab allows HR to provide a complete audit for the position. The Summary and Recommendations should include the overall findings. Each audit note field below should house the substantiating documentation to support the summary. The FLSA and EEO fields must be completed by HR prior to moving to the next tab.

**Tab Three: Available Funding Source**

This screen allows HR to identify the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position.
Tab Four: Personal and Organizational Data
This screen allows human resources to review the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description. Important - there is a requirement to complete the Employee’s User Account. If this position is vacant, select “vacant”. In addition, there is a need to complete the Supervisor’s User Account. This must have the supervisors name to ensure that the supervisor has access to the position. If the supervisor is inaccurately assigned, then the actual supervisor will not be given access to this position.

Tab Five: Duties
The “Duties” of a Position Description are the major responsibilities the incumbent in this position performs on a routine basis. There are two types of duties: essential and secondary duties. Essential duties are those that MUST be performed by the incumbent in the position. On this tab, human resources will need to identify if the duty is essential or secondary (see below). Human resources may modify the language to best represent the duty as it will flow into the description but HR may not change the intent of the position description. To modify, select ‘Edit’ which can be found under the percentage. Human resources will not have the option to modify the job description; therefore, HR must review the duties to ensure compliance with state and federal laws.

Tab Six: General Information
This screen allows human resources to review the responsibility, supervision, contacts, and funding authority for this position.

Tab Seven: How Has This Job Changed
This screen allows HR to review the hiring manager notes how the position has changed.

Tab Eight: Position Information
This screen allows human resources to review the complexity of this position as well as identify if any duties came from a different position. The hiring manager should have identified the knowledge, skills and abilities that are necessary for an applicant to effectively perform the duties of this position. Human resources will want to ensure that this is accurate to ensure compliance with the Americans with Disability Act and other federal laws.

Tab Nine: Request for Position Classification/Pay Grade Review
This screen allows HR to review the hiring manager’s review of the current classification and the recommendation of a proposed classification. The hiring manager may also identify the justification for
such a proposed title. Proposed titles do not guarantee a change in the classification but provide additional supporting information from the hiring manager’s perspective.

Tab Ten: Working Conditions
This screen is a tool that assists the institutional human resources department to work with the supervisor/hiring manager in identifying the essential physical and environmental demands of the position. This will assist in ensuring that the position complies with the American with Disabilities Act, State Workers Compensation, and the Family Medical Leave Act.

Tab Eleven: Action History
This provides a historical review of all actions that have occurred with this position. Should human resources need additional information added to the position; human resources can add information into the notes section by writing and clicking on ‘add notes’. Notes will not be saved unless confirmed.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action.

Click Confirm to complete this step.

Once BOR Human Resources Submits Approval/Denial
Notification will be submitted to Institutional Human Resources as to the classification approval or denial from BOR Human Resources once completed by BOR Human Resources. Institutional Human Resources will need to enter in the appeal date which is 14 days from the date of the postmark or the delivery of the decision. Institutional Human Resources will need to also assign the appropriate Class Code to the position based on the decision of BOR Human Resources.

Employees will be notified by email notification through the On-line Employment System and they may also be notified by Institutional Human Resource in person. This email notification will have the date for the appeal process. The employee will have a finite amount of time to respond to this notification. Please see the appropriate BOR Policy for timelines and guidance on this process.
4. Employee Review/Update a Position – BOR Human Resources - CSA Employees Only

BOR HR staff who would like to process a position must click on the ‘Pending Actions’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For CSA, there are two tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA Summary report to review the position description.

Tab One: BOR HR Use Only
This tab allows BOR HR to provide comments on the complete audit and position description summary for the position.

Tab Two: Action History
This provides a historical review of all actions that have occurred with this position. BOR HR may select to write comments in the ‘notes’ if they feel additional information is warranted.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action.

Click Confirm to complete this step.
The details of your position description are NOT SAVED until you complete this step.

Notice
Notification will be submitted to Institutional HR as to the classification approval or denial from BOR HR. Employee will be notified by email notification through the On-line Employment system and the Institutional HR may notify in person. This notification will have the date for the appeal process for Step Four (4) of the appeal process ONLY. All other deadlines are up to the employee to meet. The employee will have a finite amount of time to respond to this notification. Please see the appropriate BOR Policy for timelines and guidance on this process.

CSA Appeal Process

1. CSA Appeal Process – CSA Employees Only
CSA employee who would like to appeal a position decision must click on the ‘Begin New Action’ option under the Job Description header on the left of the site; then select the action of ‘Appeal’.
For CSA, there are eight tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”.

**Tab One: Employee Appeal Request**
On this tab, the employee must provide justification for the appeal. Information in this justification will be used during the classification appeal review.

All other tabs cannot be modified; however, the employee must move through each of the tabs by clicking on “Continue to the Next Page”.

**Submitting the Position Description**
After clicking the **Continue to Next Page** button from the previous screen, scroll down through this screen to review the information you entered. The last step is to select one of the choices and click the **Continue** button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page.

Click **Confirm** to complete this step.
**The details of your position description are NOT SAVED until you complete this step.**

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2. **CSA Appeal Process – BOR Human Resources Only**
BOR HR who needs to review an appeal must click on the ‘Pending Action’ option under the Job Description header on the left of the site; then select the position in the body of the web page.

For CSA, there are four tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”.

**Tab One: Employee Appeal Request**
On this tab, the employee must provide justification for the appeal. Information in this justification will be used during the classification appeal review.
Tab Two: Committee/Attendee Information

On this tab, BOR HR will create a committee to participate in accordance with BOR Policy 4.9. A committee chair must be selected (an HR Representative only – could include BOP) as well as the CSA Appeal Committee (typically one CSA employee but the possibility of additional members may occur). Additional participants may be selected such as supervisor, HR from the institution that is appealing, and any other witnesses as deemed appropriate. BOR HR must identify the DDN locations, address and any other demographics that are applicable. This information will be emailed to the appropriate members.

Tab Three: Committee Findings
On this tab, BOR HR can review the committee findings and recommendations for the appeal.

Tab Four: Action History
This provides a historical review of all actions that have occurred with this position. BOR HR may select to write comments in the ‘notes’ if they feel additional information is warranted.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action.
Click **Confirm** to complete this step.

*The details of your position description are NOT SAVED until you complete this step.*

### 3. CSA Appeal Process – CSA Committee and Committee Chair Only

Committee Chair’s who need to review an appeal must click on the ‘Pending Action’ option under the Job Description header on the left of the site; then select the position in the body of the web page.

For CSA, there are three tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”.

![](image1.png)

![](image2.png)

**Tab One: Employee Appeal Request**

On this tab, the employee must provide justification for the appeal. Information in this justification should be used during the classification appeal review. This tab provides the committee the employee’s rationale for appealing the decision.
Tab Two: Committee/Attendee Information
On this tab, the committee chair will be able to identify the DDN locations, address and any other demographics that are applicable as well as the participants. The chair with the CSA committee member will need to provide their response to the appeal in the field identified as Committee Findings.

Tab Three: Committee Findings
On this tab the committee can detail their findings and submit their recommendation for the appeal.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen, click on the Continue to Next Page or Preview Action buttons. Once you have reviewed the report, select the appropriate action to submit to the Institutional Chief Executive Officer.

Click Confirm to complete this step. The details of your position description are NOT SAVED until you complete this step.

4. CSA Appeal Process – Institutional Chief Executive Officer Only
Institutional Chief Executive’s who need to review an appeal must click on the ‘Pending Action’ option under the Job Description header on the left of the site; then select the position in the body of the web page.

For CSA, there are four tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”.

Tab One: Employee Appeal Request
On this tab, the employee must provide justification for the appeal. Information in this justification should be used during the classification appeal review. This tab provides the committee and the institutional chief executive officer the employee’s rationale for appealing the decision.
Tab Two: Committee/Attendee Information
On this tab, the institutional chief executive officer will be able to identify where the appeal occurred, as well as any other demographics that are applicable to the appeal. The chair with the CSA committee member will provide a response to the appeal in the field identified as Committee Findings.

Tab Three: Committee Findings
The Institutional CEO can review the committee findings and recommendations on this screen.

Tab Four: Administrator Comments
The Institutional Chief Executive Officer can provide comments as to their respective review of the appeal. These comments will be submitted to the Executive Director of the BOR for final review and final answer on the appeal.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. The appropriate workflow must be selected at this step to proceed with the appeal.

Click Confirm to complete this step.
The details of your position description are NOT SAVED until you complete this step.

5. CSA Appeal Process – BOR HR/Executive Director Only
BOR HR and the Executive Director who need to review an appeal must click on the ‘Pending Action’ option under the Job Description header on the left of the site; then select the position in the body of the web page.

For CSA, there are four tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”.

![View/Edit Action](image)
On this tab, the employee must provide justification for the appeal. Information in this justification should be used during the classification appeal review. This tab provides the committee and the institutional chief executive officer the employee’s rationale for appealing the decision.

**Tab Two: Committee/Attendee Information**
On this tab, the executive director and director of human resources will be able to identify where the appeal occurred, as well as any other demographics that are applicable to the appeal. The chair with the CSA committee member will provide a response to the appeal in the field identified as Committee Findings.

**Tab Three: Administrator Comments**
The Institutional Chief Executive Officer can provide comments as to their respective review of the appeal. The BOR HR Director can provide comments as to their respective review of the appeal. These comments will be submitted to the Executive Director of the BOR for final review and final answer on the appeal.

**Tab Four: Executive Director Findings**
The Executive Director will provide the final findings of the appeal which will be emailed to all applicable parties.

**Submitting the Position Description**
After clicking the Continue to Next Page button from the previous screen, click on the Continue to Next Page or Preview Action buttons. The appropriate workflow must be selected at this step to proceed with the completion of the appeal.

Click Confirm to complete this step. The details of your position description are NOT SAVED until you complete this step.

**CSA Institutional Update/Review a Position**

1. **Institutional Update/Review a Position – Hiring Managers Only**
   Hiring Managers who would like to review a position must click on the ‘Begin New Action’ option under the Job Description header on the left of the site; then select the action of ‘Institutional Update/Review’.

   For CSA, there are eight tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. This section is geared toward institutional review and department re-engineering.
Tab One: Available Funding Source
This screen allows the hiring manager to identify the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position.

Tab Two: Personal and Organizational Data
This screen allows the hiring manager to propose a classification title and identify position demographics (such as hours of work).

Tab Three: Duties
The “Duties” of a Position Description are the major responsibilities the incumbent in this position performs on a routine basis. There are two types of duties: essential and secondary duties. Essential duties are those that MUST be performed by the incumbent in the position. To add duties or edit duties to your Position Description, click on the “Add New Entry” from the bottom of the pager or select “edit” under the percentage.

You will be able to add or edit as many duties as needed for this particular position. For each duty you add, you should add a description of the duty per the questions asked on the form. The duty percentages MUST total 100%.

You may click the “Continue to Next Page” button to go to any additional tabs. It is also important to note that you may click the “Save and Stay On This Page” button at any time in order to save your position description for completion at a later date or to send for approval.

Tab Four: General Information
This screen allows the hiring manager to identify the responsibility, supervision, contacts, and funding authority for this position.
Tab Five: How Has This Job Changed
This screen allows the hiring manager to identify how the position has changed. The hiring manager will want to clearly and specifically identify what has changed and how.

Tab Six: Position Information
This screen allows the hiring manager to review the complexity of this position as well as identify if any duties have changed and come from a different position. The hiring manager will want to ensure that the knowledge, skills and abilities are reflected for the position and incumbent to effectively perform the duties of this position.

Tab Seven: Request for Position Classification/Pay Grade Review
This screen allows the hiring manager to review the current classification and provide a recommendation of a proposed classification. The hiring manager will also want to identify the justification for such a proposed title. Proposed titles do not guarantee a change in the classification but provide additional supporting information from the hiring manager’s perspective.

Tab Eight: Action History
This provides a historical review of all actions that have occurred with this position. The hiring manager may select to write comments in the ‘notes’ if they feel additional information is warranted.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action.

Click Confirm to complete this step. The details of your position description are NOT SAVED until you complete this step.

2. Institutional Update/Review a Position – Institutional Human Resources Only -CSA
HR staff who would like to process a position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For CSA, there are eleven tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA Summary report to review the position description.
Tab One: Assign Classification Title
This tab allows the institutional HR to update the classification title after BOR has rendered their decision. After searching for the title, click on the ‘Select Title and Continue’ link to associate this specific title with the proposed Position Description. If you do not click on the ‘Select Title and Continue’, the title will not move forward with the position description.

Tab Two: HR Use Only
This tab allows HR to provide a complete audit for the position. The Summary and Recommendations should include the overall findings. Each audit note field below should house the substantiating documentation to support the summary. The FLSA and EEO fields must be completed.

Tab Three: Available Funding Source
This screen allows human resources to review the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position. To add or change a current funding source you can select “View, Edit, Delete” or to enter in new funding sources choose Add New Entry.

Tab Four: Personal and Organizational Data
This screen allows human resources to review the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description. Important - there is a requirement to complete the Employee’s User Account. If this position is vacant, select “vacant”. In addition, there is a need to complete the Supervisor’s User Account. This must have the supervisors name to ensure that the supervisor has access to the position. If the supervisor is inaccurately assigned, then the actual supervisor will not be given access to this position.

Tab Five: Duties
The “Duties” of a Position Description are the major responsibilities the incumbent in this position performs on a routine basis. There are two types of duties: essential and secondary duties. Essential duties are those that MUST be performed by the incumbent in the position. On this tab, human resources will need to identify if the duty is essential or secondary (see below). Human resources may modify the language to best represent the duty as it will flow into the description but HR may not change the intent of the position description. Human resources will not have the option to modify the job description; therefore, HR must review the duties to ensure compliance with state and federal laws.

Tab Six: General Information
This screen allows human resources to review the responsibility, supervision, contacts, and funding authority for this position.

Tab Seven: How Has This Job Changed
This screen allows human resources to review the hiring manager’s notes identifying how the position has changed.
Tab Eight: Position Information
This screen allows human resources to review the complexity of this position as well as identify if any duties came from a different position. The hiring manager should have identified the knowledge, skills and abilities that are necessary for an applicant to effectively perform the duties of this position. Human resources will want to ensure that this is accurate to ensure compliance with the Americans with Disability Act and other federal laws.

Tab Nine: Request for Position Classification/Pay Grade Review
The eighth tab will be “Request for Position Classification/Pay Grade Review”. This screen allows the hiring manager to review the current classification and provide a recommendation of a proposed classification. The hiring manager may also identify the justification for such a proposed title. Proposed titles do not guarantee a change in the classification but provide additional supporting information from the hiring manager’s perspective.

Tab Ten: Working Conditions
The ninth tab ‘Working Conditions’ is a tool that assists the institutional human resources department to work with the supervisor/hiring manager in identifying the essential physical and environmental demands of the position. This will assist in ensuring that the position complies with the American with Disabilities Act, State Workers Compensation, and the Family Medical Leave Act.

Tab Eleven: Action History
This provides a historical review of all actions that have occurred with this position. Should human resources need additional information added to the position; human resources can add information into the notes section by writing and clicking on ‘add notes’. Notes will not be saved unless confirmed.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action.

Once BOR Human Resources Submits Approval/Denial
Notification will be submitted to Institutional Human Resources as to the classification approval or denial from BOR Human Resources once completed by BOR Human Resources. Institutional Human Resources will need to enter in the appeal date which is 14 days from the date of the postmark or the delivery of the decision. Institutional Human Resources will need to also assign the appropriate Class Code to the position based on the decision of BOR Human Resources.

Employees will be notified by email notification through the On-line Employment system and they may also be notified by Institutional Human Resource in person. This email notification will have the date for the appeal process. The employee will have a finite amount of time to respond to this notification. Please see the appropriate BOR Policy for timelines and guidance on this process.
3. Institutional Update/Review a Position – BOR Resources Only
BOR HR staff who would like to process a position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For CSA, there are two tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA Summary report to review the position description.

Tab One: BOR HR Use Only
This tab allows BOR HR to provide comments on the complete audit and position description summary for the position.

Tab Two: Action History
This provides a historical review of all actions that have occurred with this position. BOR HR may select to write comments in the ‘notes’ if they feel additional information is warranted.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action.

Click Confirm to complete this step.
The details of your position description are NOT SAVED until you complete this step.

Notice: Notification will be submitted to Institutional HR as to the classification approval or denial from BOR HR. Hiring Manager will be notified by email notification through the On-line Employment system and the Institutional HR may notify in person.

4. Institutional Update/Review a Position – Institutional Human Resources - CSA Employees Only
HR staff who would like to process a position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For CSA, there are two tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA Summary report to review the position description.

Tab One: Assign Classification Title
This tab allows the institutional HR to update the classification title after BOR has rendered their decision. After searching for the title, click on the ‘Select Title and Continue’ link to associate this specific title with the proposed Position Description. If you do not click on the ‘Select Title and Continue’, the title will not move forward with the position description.
Tab Two: Action History
This provides a historical review of all actions that have occurred with this position.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action.

Click Confirm to complete this step. The details of your position description are NOT SAVED until you complete this step.

Notice
Notification will be submitted to Institutional HR as to the classification approval or denial from BOR HR. Hiring manager will be notified by email notification through the On-line Employment System and the Institutional HR may notify in person. This process is not eligible for appeal.

NFE Institutional Update/Review a Position

1. Institutional Compensation/Review – Hiring Managers, Dean & Department Heads Only (NFE)
Hiring Managers who would like to review a position must click on the ‘Begin New Action’ option under the Job Description header on the left of the site; then select the action of ‘NFE - 2. Institutional Update/Review a Position’.

For NFE, there are eight tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the NFE Summary report to review the position description.
Tab One: Available Funding Source
This section is for Hiring Managers and Budget. Hiring managers complete the funding information to identify funding source information. Explanatory details may be inserted into the 'Hiring Manager Comments' text box. Here the hiring manager can add the fund, org, account, program, activity, percent, and comments. Please add separate entries for each funding source. Hiring managers should discuss any questions they may have with their Budget Department.

Tab Two: Personal and Organizational Data
This screen allows the hiring manager to identify the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description. Please note that there is a requirement to complete the Employee’s User Account. If this position is vacant, select “vacant”. In addition, please note that there is a need to complete the Supervisor’s User Account. This must have the supervisors name to ensure that the supervisor has access to the position. If the supervisor is inaccurately assigned, then the actual supervisor will not be given access to this position.

Tab Three: Purpose of Position
This screen allows the hiring manager to identify the purpose of the position. In this tab, the hiring manager must identify the education, experience, and supervisory responsibility.

Tab Four: Problems and Decisions
This screen allows the hiring manager to identify the position needs for problem solving, decision making, and impact on the organization of decisions made.

Tab Five: Working Contacts
This screen allows the hiring manager to identify the types of contacts and/or constituencies that this position works with on a daily, weekly, monthly basis.
Tab Six: Other
This screen allows the hiring manager to identify the type of working environment that the position works (Environment, Working Hours, and Travel required).

Tab Seven: Job Functions
The “Job Functions” of a Position Description are the major responsibilities the incumbent in this position performs on a routine basis. There are two types of duties: essential and secondary duties. Essential duties are those that MUST be performed by the incumbent in the position. The hiring manager can add, delete, or edit a duty. To add duties to your Position Description, click on the “Add New Entry” button at the bottom of the tab. To edit or delete a job function, select the edit or delete function under the percentage of the duty and you will be taken to a screen as shown below.

You will be able to add or edit as many duties as needed for this particular position. For each duty you add, you should add a description of the duty per the questions asked on the form. The duty percentages MUST total 100%.

You may click the “Continue to Next Page” button to go to any additional tabs.

It is also important to note that you may click the “Save and Stay On This Page” button at any time in order to save your position description for completion at a later date or to send for approval.

Tab Eight: Action History
This provides a historical review of all actions that have occurred with this position. The hiring manager may select to write comments in the ‘notes’ if they feel additional information is warranted.
Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action and click the Continue button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page.

Click Confirm to complete this step. The details of your position description are NOT SAVED until you complete this step.

2. Institutional Compensation/Review – Institutional Human Resources Only (NFE)
HR staff who would like to process a position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For NFE, there are eleven tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the NFE Summary report to review the position description.

![View/Edit NFE - 3. Employee Update/Review a Position](image)

**Tab One: Assign Classification Title**
This tab allows you to associate a specific classification title with the Position Description being created. In the event a classification title needs to be changed, click on the ‘Change Classification’ link to associate a specific title with the proposed Position Description. If you do not click on the ‘Change Classification’, then the current title will move forward with the position description.
Tab Two: HR Use Only
This tab allows HR to provide a complete audit for the position. The Summary and Recommendations should include the overall findings. Each audit note field below should house the substantiating documentation to support the summary. The FLSA and EEO fields must be completed.

Tab Three: Available Funding Source
This screen allows the institutional human resources to review the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position.

Tab Four: Personal and Organizational Data
This screen allows the hiring manager to identify the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description. Please note that there is a requirement to complete the Employee’s User Account. If this position is vacant, select “vacant”. In addition, please note that there is a need to complete the Supervisor’s User Account. This must have the supervisors name to ensure that the supervisor has access to the position. If the supervisor is inaccurately assigned, then the actual supervisor will not be given access to this position.

Tab Five: Purpose of Position
This screen allows the hiring manager to identify the purpose of the position. In this tab, the hiring manager must identify the education, experience, and supervisory responsibility.

Tab Six: Problems and Decisions
This screen allows the hiring manager to identify the position needs for problem solving, decision making, and impact on the organization of decisions made.

Tab Seven: Working Contacts
This screen allows the hiring manager to identify the types of contacts and/or constituencies that this position works with on a daily, weekly, monthly basis.
Tab Eight: Other
This screen allows the hiring manager to identify the type of working environment that the position works (Environment, Working Hours, and Travel required).

Tab Nine: Job Functions
On this tab, HR will need to identify if the duty is essential or nonessential. There are two types of duties: essential and secondary duties. Essential duties are those that MUST be performed by the incumbent in the position. On this tab, human resources will need to identify if the duty is essential or secondary (see below) by selecting edit by each of the job functions. Human resources may modify the language to best represent the duty as it will flow into the description but HR may not change the intent of the position description. Human resources will not have the option to modify the job description; therefore, HR must review the duties to ensure compliance with state and federal laws.

Tab Ten: Working Conditions
The tab ‘Working Conditions’ is a tool that assists the Institutional HR department to work with the supervisor/hiring manager in identifying the essential physical and environmental demands of the position. This will assist in ensuring that the position complies with the American with Disabilities Act, State Workers Compensation, and the Family Medical Leave Act.

Tab Eleven: Action History
This provides a historical review of all actions that have occurred with this position. Human resources may select to write comments in the ‘notes’ if they feel additional information is warranted.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action and click the Continue button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page.

Click Confirm to complete this step. The details of your position description are NOT SAVED until you complete this step.
3. Institutional Compensation/Review – Budget Only (NFE) – As applicable.

Budget staff who would like to process a position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For NFE, there are two tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”.

**Tab One: Available Funding Source**
This screen allows the Budget staff to identify the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position.

**Tab Two: Action History**
This provides a historical review of all actions that have occurred with this position. This provides Budget the ability to add notes in the event justification is required or if the receiver needs clarification of what to report.

**Submitting the Position**
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action and click the Continue button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page.

Click Confirm to complete this step. The details of your position description are NOT SAVED until you complete this step.

When selecting the appropriate chain of command Budget will need to send it to the appropriate individual based on the funding needs.

4. Institutional Compensation/Review – Administration Only (NFE)

Administrators who would like to process a position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For NFE, there are seven tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA and NFE Summary report to review the position description.
Tab One: Available Funding Source
This screen allows the Administrator to review the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position.

Tab Two: Personal and Organizational Data
This screen allows the Administrator to review the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description. A field is provided that the Administrator could make comments for the position review.

Tab Three: Purpose of Position
This screen allows the hiring manager to identify the purpose of the position. In this tab, the hiring manager must identify the education, experience, and supervisory responsibility.

Tab Four: Problems and Decisions
This screen allows the Administrator to review the position in areas of problem solving, decision making, and impact on the organization of decisions made.

Tab Seven: Working Contacts
This screen allows the Administrator to review the types of contacts and/or constituencies that this position works with on a daily, weekly, monthly basis.

Tab Eight: Other
This screen allows the Administrator to review the type of working environment that the position works (Environment, Working Hours, and Travel required).
Tab Nine: Job Functions
Here the Administrator can review the position’s essential and non-essential job functions as defined by the hiring manager or human resources.

Tab Two: Action History
This provides a historical review of all actions that have occurred with this position. This provides Administration the ability to add notes in the event justification is required or if the receiver needs clarification of what to report.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action and click the Continue button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page.

Click Confirm to complete this step.

The details of your position description are NOT SAVED until you complete this step.

*Note - The Administrator may select to make permanent or send to Institutional Human Resource for additional work and review.

NFE Employee Update/Review a Position

1. Employee Compensation/Review – Hiring Manager (NFE)
Hiring Managers who would like to process a position review for the employee to complete must click on the ‘Begin New Action’ option under the Job Description header on the left of the site; then select the ‘NFE – 3. Employee Update/Review a Position’. Select the appropriate position in the body of the page that should be reviewed.
For NFE, there are three tabs across the top of the screen. To move through the process, you will need to select “Continue to the Next Page”. At any point, you can select the NFE Summary report to review the position description.

Tab One: Initiate NFE Review
This tab allows the hiring manager to initiate an employee review. The hiring manager should complete so that an email will notify the employee to complete the process.

Tab Two: Available Funding Source
This allows the hiring manager to identify the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position.

Tab Three: Action History
This tab allows the hiring manager to add comments to the position as he or she sees necessary. To add notes, fill in the comments in the notes area and select ‘ADD NOTES’ to tie the note to the position.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action and click the Continue button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page. Select Confirm or the action will not be completed.
2. Employee Compensation/Review – Employee, Hiring Managers, Dean & Department Heads Only (NFE)

Employees who would like to process a position review must click on the ‘Pending Actions’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed. However, the employee cannot begin this action. The supervisor must initiate.

This action allows the hiring manager to request the employee to review and update their position description. The employee completes this and then the hiring manager has the ability to go through, review and modify. The Dean/Department Head has the ability to do the same. For this action, there are seven tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the NFE Summary report to review the position description.

Tab One: Personal and Organizational Data
This screen allows the employee to identify the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description.

Tab Two: Purpose of Position
This screen allows the employee to identify the purpose of the position. In this tab, the employee must identify the education, experience, and supervisory responsibility for the position in which they are
working. This does not imply that the employee should complete based on their own education and experience but rather if they left today what would the institution need to be successful in this position.

**Tab Three: Problems and Decisions**
This screen allows the employee to identify the position needs for problem solving, decision making, and impact on the organization of decisions made.

**Tab Four: Working Contacts**
This screen allows the employee to identify the types of contacts and/or constituencies that this position works with on a daily, weekly, monthly basis.

**Tab Five: Other**
This screen allows the employee to identify the type of working environment that the position works (Environment, Working Hours, and Travel required).

**Tab Six: Job Functions**
The “Job Functions” of a Position Description are the major responsibilities the incumbent in this position performs on a routine basis. There are two types of duties: essential and secondary duties. Essential duties are those that MUST be performed by the incumbent in the position. The employee can add, delete, or edit a duty. To add duties to your Position Description, click on the “Add New Entry” button at the bottom of the tab. To edit or delete a job function, select the edit or delete function under the percentage of the duty (see below).

You will be able to add or edit as many duties as needed for this particular position. For each duty you add, you should add a description of the duty per the questions asked on the form. The duty percentages MUST total 100%.

You may click the “Continue to Next Page” button to go to any additional tabs.

It is also important to note that you may click the “Save and Stay On This Page” button at any time in order to save your position description for completion at a later date or to send for approval.

**Tab Seven: Action History**
This provides a historical review of all actions that have occurred with this position. This provides the employee the ability to add notes in the event justification is required.

**Submitting the Position Description**
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action and click the Continue button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page.
Click Confirm to complete this step. **The details of your position description are NOT SAVED until you complete this step.**

3. Employee Compensation/Review – Institutional Human Resources Only (NFE)

HR staff who would like to process a position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For NFE, there are eleven tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the NFE Summary report to review the position description.

Tab One: Assign Classification Title

This tab allows you to associate a specific classification title with the Position Description being reviewed. If the position classification has changed, click on the ‘Change Classification’ link to associate this specific title with the proposed Position Description. **If you do not click on the ‘Change Classification’, the current title will move forward with the position description.**

Tab Two: HR Use Only

This tab allows HR to provide a complete audit for the position. The Summary and Recommendations should include the overall findings. Each audit note field below should house the substantiating documentation to support the summary. The FLSA and EEO fields must be completed.

Tab Three: Available Funding Source

This screen allows human resources to review the funding, organization, available dollars, and percentage identified with the appropriate fund source. The percentage does not equate to percent of effort or FTE, but rather the percent the funding source would be used. There can be multiple funding sources but all shall equal to 100% regardless of the percent of effort or FTE for the position. To add or change a current funding source you can select “View, Edit, Delete” or to enter in new funding sources choose Add New Entry.
Tab Four: Personal and Organizational Data
screen allows the hiring manager to identify the supervisor assigned to the position, propose a
classification title, institutional and department demographics, position demographics (such as hours of
work), and assigning additional users within the department to have access to the position description.
Please note that there is a requirement to complete the Employee’s User Account. If this position is
vacant, select “vacant”. In addition, please note that there is a need to complete the Supervisor’s User
Account. This must have the supervisors name to ensure that the supervisor has access to the position.
If the supervisor is inaccurately assigned, then the actual supervisor will not be given access to this
position.

Tab Five: Purpose of Position
This screen allows the hiring manager to identify the purpose of the position. In this tab, the hiring
manager must identify the education, experience, and supervisory responsibility.

Tab Six: Problems and Decisions
This screen allows the hiring manager to identify the position needs for problem solving, decision
making, and impact on the organization of decisions made.

Tab Seven: Working Contacts
This screen allows the hiring manager to identify the types of contacts and/or constituencies that this
position works with on a daily, weekly, monthly basis.

Tab Eight: Other
This screen allows the hiring manager to identify the type of working environment that the position
works (Environment, Working Hours, and Travel required).

Tab Nine: Job Functions
On this tab, HR will need to identify if the duty is essential or nonessential. There are two types of
duties: essential and secondary duties. Essential duties are those that MUST be performed by the
incumbent in the position. On this tab, human resources will need to identify if the duty is essential or
secondary (see below) by selecting edit by each of the job functiuons. Human resources may modify the
language to best represent the duty as it will flow into the description but HR may not change the intent
of the position description. Human resources will not have the option to modify the job description;
therefore, HR must review the duties to ensure compliance with state and federal laws.

Tab Ten: Working Conditions
The tab ‘Working Conditions’ is a tool that assists the Institutional HR department to work with the
supervisor/hiring manager in identifying the essential physical and environmental demands of the
position. This will assist in ensuring that the position complies with the American with Disabilities Act,
State Workers Compensation, and the Family Medical Leave Act.

Tab Eleven: Action History
This provides a historical review of all actions that have occurred with this position. Human resources
may select to write comments in the ‘notes’ if they feel additional information is warranted.
Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action and click the Continue button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page. Select Confirm to submit the action.

4. Employee Compensation/Review – Administration Only (NFE)
Administrators who would like to process a position must click on the ‘View Pending’ option under the Job Description header on the left of the site; then select the position in the body of the page that is being reviewed.

For NFE, there are two tabs across the top of the screen. To move through the tabs, you will need to select “Continue to the Next Page”. At any point, you can select the CSA and NFE Summary report to review the position description.

Tab One: Personal and Organizational Data
The first tab will be “Personal and Organizational Data”. This screen allows the hiring manager to identify the supervisor assigned to the position, propose a classification title, institutional and department demographics, position demographics (such as hours of work), and assigning additional users within the department to have access to the position description. A field is provided that the Administrator could make comments for the position review.

Tab Two: Action History
This provides a historical review of all actions that have occurred with this position.

Submitting the Position Description
After clicking the Continue to Next Page button from the previous screen and viewing any notes associated with the position description, click on the Continue to Next Page or Preview Action buttons. Scroll down through this screen to review the information you entered. Once reviewed, select the appropriate action and click the Continue button either at the top or the bottom of this page. The choices reflect all potential chain-of-commands. Please be sure to accurately select the appropriate chain-of-command reflective in your organization. After selecting your choice, click Continue to go to the confirmation page.

Click Confirm to complete this step. The details of your position description are NOT SAVED until you complete this step.

*Note - The Administrator may select to make permanent or send to Institutional Human Resource for additional work and review.
OTHER POSITION DESCRIPTION ACTIONS

Position Description - Begin New Actions
CSA employees using this On-line Employment System can select the applicable actions in the position description module. To view applicable actions for the employee, he or she should select ‘Begin New Action’ on the left menu under Position Descriptions. From the menu, the employee can select the appropriate action.

Position Description - Searching Position Descriptions
Regardless of your position and classification, employees may filter selection by specific search criteria, or you may leave the search criteria blank to retrieve all of the approved position descriptions in the system. Select ‘Search PDS’ from the left-hand column under ‘Position Descriptions.’
Position Description - Searching Pending Actions
Regardless of your position and classification, employees will have the option to search for pending actions. Click on the “Pending Action” link on the left navigation bar, and select the appropriate action.
**Important tip on system generated notifications:** The system will generate automated email notifications for an employee should an action need to be completed. As this is as Regental system employment service, these emails will be identified by the system and will have specific information regarding the type of action and the URL for which an employee should enter. Employees may also
enter the site at any given opportunity and select ‘View Pending’ under the Job Description link on the left side of the web page.

**Changing Your User Type**

If an employee holds more than one role (employee, supervisor, administration), then the employee must select the appropriate user type to process actions within the On-line Employment system. For example, as a CSA employee if there are pending actions, the user type selected would be CSA Employee. To take action for supervisory actions, the user type selected would be hiring manager. To change the user type, click the “Change User Type” link on the left navigation bar, and select the required role.

**Logging Out**

To ensure the security of the data provided by applicants, **the system will automatically log you out after 60 minutes if it detects no activity**. However, anytime you leave your computer we strongly recommend that you save any work in progress and Logout of the system by clicking ‘Logout’ under the ADMIN portion of the left-hand navigation bar.