PEOPLE ADMIN MANUAL:

• How to Modify a Current Position

  o Change something on a current position
  o Change something on the person in that current position
  o Reclassifying position – changing job to fit changing business needs
  o Update a job description as needs change or before posting
  o Submit a resignation or retirement letter
  o Change of hours or salary
  o Change of person sitting the position number
  o Change of supervisor

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When to Modify a position:

Modifying changes to current position number:

Changes are to be made to an employee’s current position number for reasons including but not limited to;
- Org Split
- Change in hours
- Salary adjustment
- Updating Job description
- Title Change
- Changes in classification (Levels)

Modifying changes to prospective position number for promotion:

In the event of a promotion, and an individual is moving into a new position number in your organization, then you need to modify position of the position the employee is moving into.
The only reason to modify a current position number for a promotion is if there is no movement in the department, but only a title and salary change to the employee

Example: Employee A is going to be promoted into Employee B’s position. You would modify Employee B’s position and add Employee A into it.
• **Step 1: Logging In**

1) Go to [https://jobs.uco.edu/hr](https://jobs.uco.edu/hr)

***Note:*** If you get an error message when you try to log in, it means that your cache is remembering the link to the old site. Just clear your cache and try again.

2) Click on the Blue wording to get to access the system

3) Central Authentication Service page
   a. sign in using your computer user name and password.

****NOTE:*** There are now 2 steps that must be completed in order to post a position.

- **1st step:** Create a position description (job description) in the Position Management Module.
- **2nd step:** Post a position (job description) in Applicant Tracking Module.

****NO job descriptions migrated over to the new system. ALL descriptions will have to be created before posting.

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**Step 2: Position Management Module**

To start a position description:
1. Click drop down and select Position Management Module. Header will turn orange in color.
2. Click drop down and select Originator user type.
3. Click on the Refresh button.
4. Green line appears at the top to indicate your action was successful. If ever there is a red line, that means an error has occurred.

***NOTE:*** Originator will be the user type that will need to be used to create or modify a position. If you do not have the Originator access, please email Shandise Brown at sbrown91@uco.edu and let her know the org number and the user/approver type you need. The user/approver types are Originator, Dean/Director or AVP.
Step 3: Select From Position Description the type of position you want to modify.

1) Click on Modify Position Description for the type of position you are changing: Faculty, Staff or Student.

Step 4: Select a Position to Modify

1) In the search box, put in the employee’s name **for the position you want to modify** and click the Search button. There are 36 pages to look through and the easiest way to find the position is by employee name.

***Important Note: If you are promoting a employee and they are moving from one position number to another one. Find the position that the person will be moving into and modify that position. This process involves making changes to the position associated with a position number and not the person***

2) Click on the blue title of the position (tied to a position number) you want to modify.
Step 5: Position Description:

1) The Position Description page will appear. Read and verify this is the position that needs to be modified.
2) This will have a 2 sections: A Profile and A Position section
   a. Profile section: is the summary of the position and the position qualifications
   b. Position section: is where you will need to list or edit the essential duties, preferred qualification and the competencies needed to be successful in the position.
3) Click “Modify Position Description” in the upper right corner by the yellow star.

Step 6: The next screen will verify that you want to modify a position description. Click Start
Step 7: Select Classification:
There are 2 different options at this point:

1) If you are need to change orgs, update the job description, change employee’s hours they are working, submit a resignation or retirement, adjust salary, or change the employee in this position number

2) Click NEXT because the profile (position summary and level) is not changing (if needing to change the profile, go to Step 7, #3)

3) If the position need to be reclassified to a different profile and the employee will keep the same position number (example Compensation Specialist to HR Generalist) due to a department realignment, or the profile that was selected for the position was incorrect.

4) SCROLL DOWN to see a list of available profiles classifications.

5) Click on “Filter these results” and type in the title of the new profile/classification you want this position to become.

6) Click the radio button of the new profile

7) Click NEXT at the top of the page

If you don’t know what the profile classification title is, you can search the families and profiles on the WIKI Management Central, under the Compensation in the HR section [https://wiki.uco.edu/display/centralsupv/HR+Compensation](https://wiki.uco.edu/display/centralsupv/HR+Compensation) or send an email to compensation and we will email an excel copy of all the profiles and levels to you.
Step 8: Employee Details:
1) Verify it is the correct employee in the position
2) Click Next
   *If putting a new person into this position, click the vacate button and it will remove the employee listed
   from the position.
   ***NOTE: At this current time, there is not a list of employees for you to be able add a new employee
   into the position. In the notes at the end when you are moving it to Compensation, tell Compensation
   who you want seated in this positon, and we will be able to add them to the position.

   IGNORE the USER section

Step 9: Position Details Page:
Position Modification Details
1) Fill in the required fields that have a red asterisk beside them or a red box around them.
2) Check the boxes indicating reason for the change to the position. There can be multiple boxes
   checked.
3) Fill in the effective date: it must be the beginning of a payroll period for the current employee. It may
   take up to 2 weeks to process a modify through all of the approval queues. (See approval queue
   information on page 10)

Effective Dates:
**A Modify that affect pay or the orgs pay is coming from need to be through the 7 approvers in
the queue 3-5 days prior to the effective date. If it doesn’t through the queue prior to the date
due to payroll, the effective date will be changed to the next available payroll date.

*Non- exempt positions effective date need to correspond with a bi-weekly payroll. The modify
needs to be through all steps in the queue and in HR a minimum of 2 days prior to that payroll’s
End Date.

*Exempt positions effective date needs to be the 1st day of a month. The modify needs to be
through all steps in the queue and in HR a minimum of 2 days prior to that payroll’s End Date.
4) Explain the reason for the change or the changing business needs of the department. This is a very important part of the modify. We use this section to verify the modify falls within UCO’s policy.

Note: Use the “Other” box – for supervisory change/ development plan milestone to name a few. Please tell us ALL we need to know about the change.

Step 10: Position Information:

Department Specific Essential Job Function box:
1) The next three boxes need to be filled in for any change in pay or a reclassification of a position.
2) Department Specific Essential Job Functions.
   a. List the duties or responsibilities that this position was created to perform them. It identifies the nature of the work that is performed and the outcomes of the performance of these duties.
      i. ie, required to open and close the office; essential position and required to come in and shovel snow when university is closed;

Job descriptions are used for the hiring process, the performance evaluation process, communication between employees and their supervisors about job responsibilities, and the identification of training needs. Job descriptions serve as a broad outline of the duties and responsibilities of a job. Job descriptions are not restrictive in the sense that they exclude the assignment of other duties and responsibilities; in fact, job descriptions can be expected to change as the work performed changes. It is the responsibility of employees to review and understand the duties and responsibilities of their job as stated in their job description. Supervisors should
recognize when the broad outline of duties and responsibilities needs to be updated and work with the Office of Human Resources as job change. It is recommended for departments to maintain specific job duty lists or desk job descriptions particular to a position which has more detail than the job description.

3) **Qualification/Knowledge Preferred:** The **required qualifications** are set by the classification and level, however, the position might need additional knowledge to be successful. For example, you may prefer Banner experience, specific certification, specific experience, specific degree or a higher degree. This is where you can list that information.

4) **Responsibilities/Skills/Competencies:** The combination of observable and measurable knowledge, skills, abilities and personal attributes that contribute to enhance the employee’s performance and make them successful in the position.
   a. **Knowledge** is the cognizance of facts, truths and principles gained from formal training and/or experience. Application and sharing of one’s knowledge base is critical to individual and organizational success. List what is knowledge is needed.
      i. Example: Demonstrated work experience with evaluating and resolving hardware and software problems and facilitating program expansion; maintaining security, back up of files; researching, reviewing, analyzing, recommending hardware and software.
   b. A **skill** is a developed proficiency or dexterity in mental operations or physical processes that is often acquired through specialized training; the execution of these skills results in successful performance.
   c. **Ability** is the power or aptitude to perform physical or mental activities that are often affiliated with a particular profession or trade such as computer programming, plumbing, calculus, and so forth. Although organizations may be adept at measuring results, skills and knowledge regarding one’s performance, they are often remiss in recognizing employees’ abilities or aptitudes, especially those outside of the traditional job design.
   d. **Individual attributes** are properties, qualities or characteristics of individuals that reflect one’s unique personal makeup. Individual attributes are viewed as genetically developed or acquired from one’s accumulated life experiences. Although personal characteristics are the most subjective of the components, a growing, significant body of research links specific personality traits to successful individual and organizational performance.
      i. Example: Social Perceptiveness - Demonstrates good human relation skills to establish and foster good relationships with subordinates, university employees, and students. Must have a service attitude.
5) Fill in all the blanks that apply to the modify. 
6) Org splits are needed. Please indicate the dollar amount being paid out of each different org.

7) Originator Access box: Determine who needs to be added to this box so they can see what is happening in the department. Most Departments want either the Business Manager or Budget Officer given this access. If you don’t know who to add here, please call Compensation Dept to find out.

8) Click NEXT

**Step 11: Supervisor:**

1) Supervisor screen auto populates with the position current supervisor.
2) If it is correct, Click NEXT
3) If the supervisor is not correct,

4) Click on the blue words Filter these results and put in the name of the new supervisor and click Search button.

5) Position Type: select Faculty or Staff

6) Check the radio button in front of the new supervisor’s name

7) Click NEXT. The new supervisor will be updated.

**Step 12: Additional Documentation:**

This page allows you to add additional documents that would help others in the workflow.

1) Upload resignation or retirement letter from the employee;

2) An email between department and the VP discussing the position and the business need for the change. (This is important to jog the memory since some of the changes happen months after the discussion.)

3) An org chart to show the new alignment of the department;

4) **Budget transfer paperwork.** If money is to be transferred, the transfer paperwork **must be attached** or the position will be returned to the Originator from budget.

5) Click “Next”

**Step 13: HR Use only page:** Click “Next

Nothing needs to be done on this page. It is information that will be added by compensation before form is given to payroll.
Step 14: Position Request Summary:

1) Allows editing of the position description before moving it to the next step in the approval process.
2) If Editing is needed. Click the word Edit at the top of the page next to the title OR click the Edit link at the top of each category (ex: title section if needing to edit the title).
3) Verify both sections The Classification and the Position Details are filled out.
4) One indication that something didn’t get filled out, will be the red circle next to the section.
   a. Click Edit in that section and look for a field that didn’t get filled in.
   b. If there are all blue check marks beside the sections, this means all required fields have been filled in.
5) SAVE any changes made

Step 15: Take Action

1) Click on the orange “Take Action on Position Request” in the upper right hand corner.
2) The drop down will give you several choices
   a. Keep working on this position – puts this position into a DRAFT that you can come back and work on it later.
   b. Cancel – if you want to delete/cancel this position description
   c. Staff – move to Compensation
   d. Faculty – move to Academic Affairs Budget
   e. Student – move to Compensation

Take action also gives you a text box to put in notes: This is recommended. Let Compensation or Academic Affairs know what is requested or what action is being taken.

Check Box: check the box if you want to be able to see where the position is at in the queue.

Please let us know if it is a retirement, updated job description, etc. or if there are any special instructions.

Also, this is where you will tell us who needs to be added into the position from the Employee Details section.
You will be able to see the position under Position Request (3RD TAB OVER) in your watch list if the box was check in the TAKE ACTION box to add this position to your watch list.

- **Current State** - is the state of the position: Draft, Approved,
- **State Owner** - is where the position is at in the workflow/queue

The Originator will receive an email generated from the system (Compensation Team) that will say that the position has been approved or that the modify has been through the system and approved.

**Now what?**

This means that

- the supervisor can NOW tell the employee about the change to their position
  - Make sure to OPEN the position and look to see if the effective date is the same as requested
    - If it had to be changed due to not making it to HR before the effective date, then you will know the new effective date.
  - The Supervisor should print out the updated job description and go over it with the employee.
  - Have the employee sign the new job description and put that copy in the department’s employee’s personnel file.
- the positions has been approved and it is ready to post
TIPS AND TRICKS of People Admin 7.6

Workflows:

The modified position will have to go through each step in the workflow. Understand that it might take 2-3 days for each step of the workflow because all the approval people might be in meetings or away from your desk for a day or back-logged.

1. Position Management Modification workflow:
   a. Staff - Originator>>Compensation>>Budget>>(AABudget/Grants/Aux) >>Dean/Director>>AVP >>VP>>Compensation>>Human Resources
   b. Faculty/Adjunct – Originator>> Dean/Director>> AVP>>VP>>Academic Affair Budget>>Budget>>Compensation>>Human Resources
   c. Staff Position Description update job description in the system or submitting a resignation or retirement letter: Originator>>Compensation>>Approved
   d. Student Position Description: Originator>>Compensation>>Approved

2. Applicant Tracking workflow:
   a. Staff Postings: Originator >>> Budget (or AA Budget/Grants/Auxillary) >>> Dean/Director>> AVP >>> VP >>> Compensation >>> Hiring
   b. Faculty/Adjunct Postings: Originator >> Dean/Director>> AVP >> AA Budget >> (Grants if required)>> Budget >> Compensation >>> Hiring
   c. Student Posting: Originator>>Human Resources (Hiring)

NOTE: Student employment

If the student worked for you last semester or during the summer, you can just complete an Student Employment Action Form (SEAF) to rehire them for the fall or for the fall and spring semester.

All student positions are termed at the end of the Spring semester so you will have resubmit an SEAF form if you want to keep them for the summer semester.

If you hired a student in June, 2014 in the PA 5.8 system but they haven’t started yet, you are fine. You will not need to complete an SEAF form this semester.

If you have a vacant student position and need a student to fill it, then you will need to create a job description in the Position Management module of the new PA 7.6 then post the new job description in the Applicant Tracking module. This way HR know when they have been hired and we can send them all the information they need and notify them to come into the HR office to be put in the system to be paid and we can verify they have the legal right to work in the United States.
The History tab allows you to read the notes that have been put in the system...hopefully at each step. If the position has been returned to you from Compensation, or another user type, this is where you find out why and who has looked at the position.

Note: The term “override” will populate as the originator moves it to the next level. Please ignore the terminology...it was the only way people admin could fix a glitch in the system by “overriding” it.

New Feature: you can now use your browser’s "Back", "Forward" or "Refresh" buttons to navigate the site.
Set Profile Default: Go to “My Profile” – Take Action on User – Edit Profile – Preferred group Login and Select your default group. You can also edit the emails you receive about the notifications happening on a position through this tab.

Need user type: Send Compensation an email with the user types needed. Example “Need Director Access for Org 010555 and 20225”. We can set you up in the system because currently the email notification is not working.

Position Document: Only one upload can occur on the Position Document section, but they can be edited or additional documents uploaded at the summary section.

Drafts and/or History of Modify’s

Hover Position Descriptions and select the “Staff Position Request” link to access all of your position requests (drafts, works in progress, and approved). This is also where you can view where the request is at in the queue if you have forgotten to put it on your watch list.

Removing items from Watch List:

At the bottom of your home screen, there is a Watch List that includes three tabs; Postings, Hiring Proposals, and Position Requests.

If there are any unwanted items in there that you would like to be removed:

1) Go to the top right corner of the page and click the “Watch List” button, located just under “Inbox”.
2) The items will be shown in a list format, showing the job title, type of position, current state, state owner and the creator.
3) On the items that you would like to be removed, hover the actions button with a drop down arrow and select “Unwatch Position Request”.
4) If you would like to view the position before, select “Show Position Request”.

Pay Grade of the Position: The pay grade of the position is listed in the position description itself in the area below the Scope/Supervision section.

1) Hover Position Descriptions and select the type of position description you are wanting to access.
2) Select the position description you want to see the pay grade of.
3) Scroll down to the Pay Grade section and you will see the appropriate grade. To access the dollar figures associated with the pay grades please visit Compensations web site and download the Pay Grade spreadsheet. Managers can also access this document through the WIKI Central.