Position Management

Staff and Professional Positions:
Update/Reclassify an Existing Position

COLLEGE OF WILLIAM AND MARY

Human Resources

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Update/Reclassify an Existing Position

Login to PeopleAdmin at https://jobs.wm.edu/hr. Select the Position Management module by hovering over the Applicant Tracking heading located at the top right hand section of the screen. The heading of page will turn to orange.

To start the process, hover over Position Description on the Navigation Bar and select the type of position to be updated or reclassified → Staff/PPF or → Instructional/Executive.

Note: The Staff/PPF and Instructional/Executive Actions choices display positions with current actions in progress.

Hover over the Action Link on the right of the position you want to modify then click on View. Click on Update/Reclassify Existing Staff/PPF Position Description to start the modification action.
A confirmation screen will pop-up to notify you that the once you start this type of action, the position description will be locked from other updates. Click **Start** to continue the process.

### Classification Details

To request a change in the Role Title click the radio button next to the proposed Role Title and click **Next >>**. Note: Role Titles are determined based on a classification/compensation review.

To view the Role Title hover over the Actions and choose View Role Title.
Position Details

The current incumbent information will default under the Employee Information section.

Select the reason for the action under the Action Type by clicking in the check box (note: if there are no changes, you will update through the "Re-fill a Position with an Approved Position Description" process). Any changes, including minor changes, will follow the process below.

Update the other fields as appropriate and use the Previous, Next buttons to continue the Job Duties tab.

Please select only one action type

Action Type: Choose One

- Recruitment (PD Changes)
- Employee Classification/Compensation Review (Role Change, In-band, etc)
- Abolish

Note: While in the Editing mode you can access a specific tab directly instead of by clicking on the tab name on the left side under Editing Action.
Job Duties

Edit existing job duties, additional duties may be added by clicking on , duties may be deleted by checking the box next to “Remove Entry”. Make sure the percentage adds to 100%. Use the buttons to continue the Physical Demands Form.

Physical Demands Form

If the physical demands have changed, update the type of physical demands, degree of physical demands, visual demands, physical surroundings and hazards to indicate how often it is done (occasionally (O), frequently (F), or constantly (C)) by selecting from the drop-down box.

Helpful Hint: Use the arrows on your keyboard to tab through the selection list or “Hot Keys” by entering “O” for occasionally, “F” for frequently or “C” for constantly. Use buttons to continue to the Supervisory Position tab.
Supervisory Position

If there is a change in Supervisory Position, select the appropriate Supervisory Position. Select **Filter These Results** below the Selected Supervisor information and change the position type to search for Instructional Faculty/Executive supervisors.

Use **Next** buttons to continue to the **Budget Information** tab.

**Budget Information**

Complete all required information and scroll down the form to the Banner Funding. Use buttons to continue to the **Internal Documents** tab.
Internal Documents and Classification/Compensation Review

Updated organizational charts are required for all position actions. Other documents may also be attached, i.e., relevant memos, position budget justification, etc. Complete the Classification/Compensation Review Form available under My Links > Useful Links on the Home Page and upload under the Internal Documents tab.

To attach a document, hover the cursor over the button next to the document type.

**PLEASE NOTE:**

* Hiring Officials need to attach the Org Chart
The following drop down choices will appear for you to select.

Select **Upload New** to upload a document from your files. Click on submit. All uploaded files must be converted to PDF and you should see a message “PDF Complete” when the files have successfully uploaded.

Select **Create New** to open the system format editor to create a document. Once you are finished, click on Submit, then Confirm.

Select **Choose Existing** to link a document that was previously attached by selecting the document from the list, then click on Submit, then Confirm.

Use buttons to continue to the **Employee Details** tab.
Employee Details

This tab provides the information for the current employee in the position. If this position is going to be recruited, the new employee’s details will default after the recruitment and hiring proposal has been completed.

Use \textit{Next} buttons to continue to the \textbf{Action Summary}.

Action Summary

The Summary Tab provides the opportunity to review the position request and make any changes before submitting it for further approval. The overall Summary shows the Summary, History, and Settings (Posting Settings) in a tab view format.

To move the Position Action along in the process hover on the \textbf{Take Action on Action button} and the appropriate actions will appear available for you to choose.
Once the Action is selected, a comment box will appear and a comment may be added that will be incorporated into the e-mail notification sent to the next approver. Please keep in mind that these comments will become part of the position record and cannot be removed.

If you want to monitor the progress and access it easily later, add the Action to your watch list. You will be able to view it quickly from your home screen. Select **Submit**.

![Add to watch list](image)

Note: You have the ability to add this Action to your watch list by checking the box located in the Comment section.

Information messages will appear at the top of the screen to let you know your Action has been routed to your selected approver or to alert you to an error. Successful transitioned messages appear in Green and error messages appear in Red.
WORK FLOW PROCESSES – Update/Modify Staff/PPF Positions:

- Hiring Official creates, routes to Level 1 (Department Approval)
- Level 1 routes to Level 2 (Division or Dean Approval)
- Level 2 routes to Class/Comp Initial Review
- Class/Comp reviews, routes to Provost/VP Administration
- Provost/VP Administration routes to Finance: Budget, OSP, Invest Admin
- Finance routes to Class/Comp Final Review*
- Class/Comp finalizes, moves to Approved PD
- Hiring Official Notified

*Finance has the option to return an action to the hiring official for correction/revisions to budget and accounting information.