

Position Management

Staff and Professional Positions:
Update/Reclassify an Existing Position

COLLEGE OF WILLIAM AND MARY

Human Resources

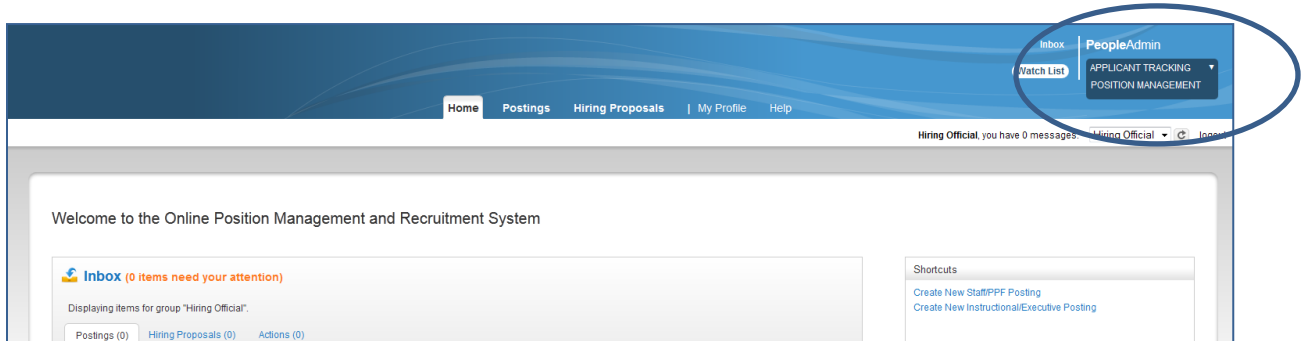
June 2014

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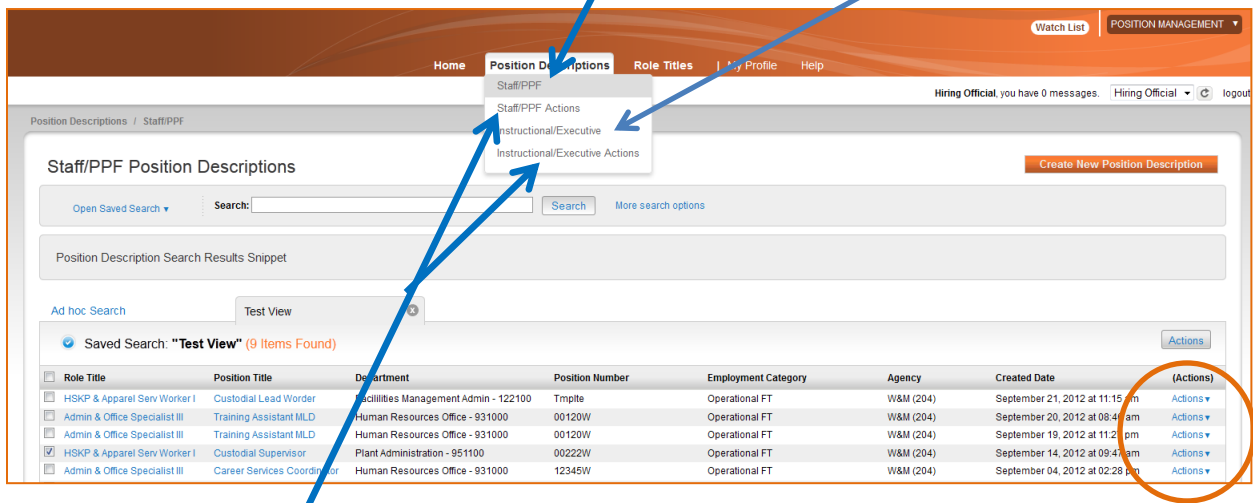
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Update/Reclassify an Existing Position

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**.

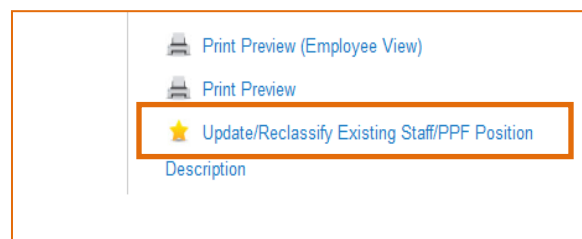


To start the process, hover over Position Description on the **Navigation Bar** and select the type of position to be updated or reclassified → Staff/PPF or → Instructional/Executive.



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

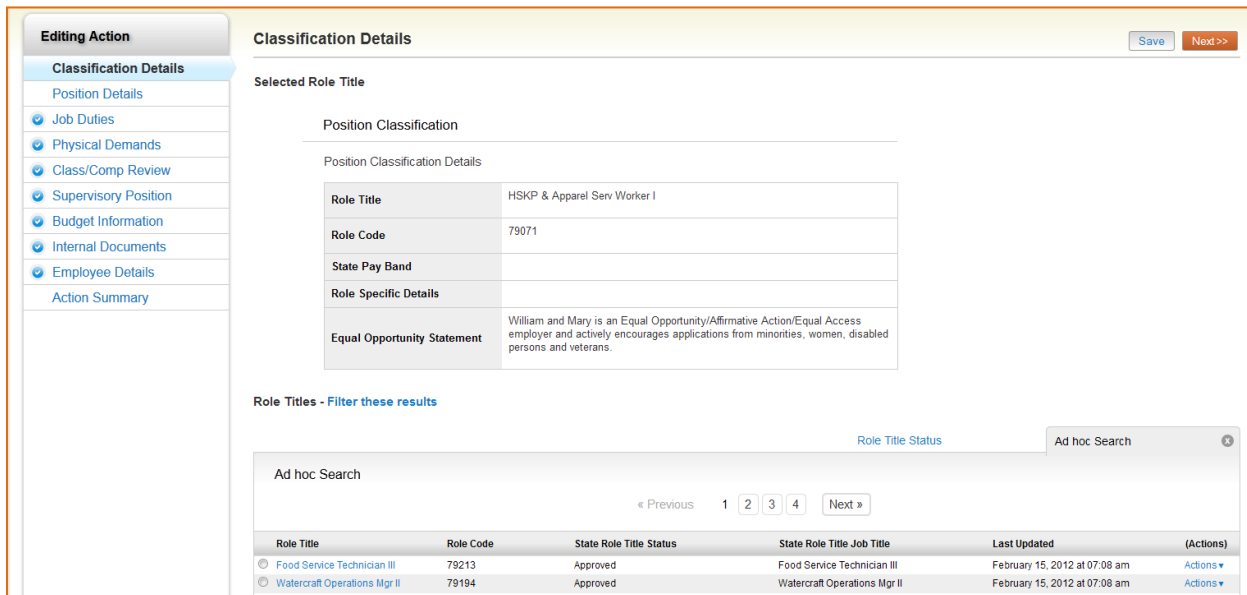


A confirmation screen will pop-up to notify you that the once you start this type of action, the position description will be locked from other updates. Click [Start](#) to continue the process.

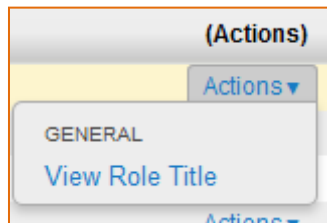


Classification Details

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 [<< Prev](#) [Next >>](#) buttons to continue the **Job Duties** tab.

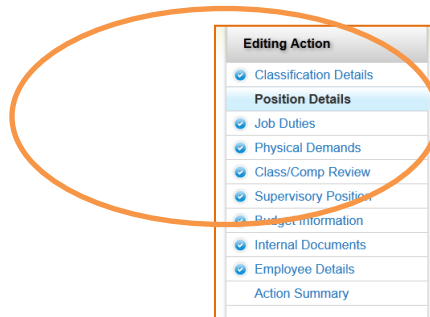
Action Type

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 [Add Job Duties Entry](#), duties may be deleted by checking the box next to “Remove Entry”. Make sure the percentage adds to 100%. Use the [Next >>](#) buttons to continue the **Physical Demands Form**.

Editing Action

- Classification Details
- Position Details
- Job Duties**
- Physical Demands
- Class/Comp Review
- Supervisory Position
- Budget Information
- Internal Documents
- Employee Details
- Action Summary

Job Duties [Save](#) [<< Prev](#) [Next >>](#)

[Check spelling](#)

*** Required Information**

Job Duties

On this screen, please list in order of importance, and in detail, the job function and duties assigned to this position and estimate the percentage of time given to each function. To begin entering each individual duty, click the **Add Entry** button. Enter each percent of time and duty, and click the **Add Entry** button. Percentages must add up to 100%. You may copy and paste from another document. Do not include duties which constitute less than 5%. To a Job Duty click the **Add Entry** button below.


Please Note:

If this position supervises professional/operational/classified employees click here to copy and paste the standard [Performance Management Duty Link](#).

Percentage Of Time	40
Description	Perform and Provide General Cleaning Duties in Academic and Administration Buildings. Conduct Inspections. -Provide general cleaning duties within the academic, administration building zones in compliance with custodian route sheet schedules to ensure that areas within designated areas will be maintained at a 96% level of cleanliness daily.
<input type="checkbox"/> Remove Entry?	
Percentage Of Time	10
Description	Job Training -Ensure staff is trained on proper procedures and guidelines related to housekeeping. -Ensure staff is trained on the correct use of equipment and chemicals.

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 [Next >>](#) buttons to continue to the **Supervisory Position** tab.

Editing Action

- Classification Details
- Position Details
- Job Duties
- Physical Demands**
- Class/Comp Review
- Supervisory Position
- Budget Information
- Internal Documents
- Employee Details
- Action Summary

Physical Demands [Save](#) [<< Prev](#) [Next >>](#)

Types of Physical Activity

Climbing	Frequently	Going up or down ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized.
Stooping	Please select	Bending body downward and forward by bending at the waist. This factor is important if it occurs in a considerable degree and requires full use of the lower extremities and back muscles.
Balancing	Please select	Maintaining body equilibrium to prevent falling when walking, standing, or crouching on narrow, slippery, or erratically moving surfaces.
Crouching	Please select	Bending the body downward and forward by bending leg and spine.
Kneeling	Please select	Bending legs at knee to come to a rest on knee or knees.

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.

Editing Action

- Classification Details
- Position Details
- Job Duties
- Physical Demands
- Class/Comp Review
- Supervisory Position**
- Budget Information
- Internal Documents
- Employee Details
- Action Summary

Supervisory Position [Save] << Prev Next >>

On this tab you can select the Supervisory Position for the position description you are creating.

Selected Supervisor

Job Title	Career Services Coordinator view
Position Number	12345W
Position Type	Staff/PPF
Org Unit	Human Resources Office - 931000
First Name	Kaleigh
Last Name	Ketron
Email	
User Groups	Applicant [The College Of William & Mary], Employee [Human Resources Office - 931000]

Position Descriptions - Filter these results

Test View

Saved Search: "Test View" (9 Items Found)

Role Title	Position Title	Department	Position Number	Employment Category	Agency	Created Date	(Actions)
HSKP & Apparel Serv Worker I	Custodial Lead Worder	Facilities Management Admin - 122100	Tmppte	Operational FT	W&M (204)	September 21, 2012 at 11:15 am	Actions
Admin & Office Specialist III	Training Assistant MLD	Human Resources Office - 931000	00120W	Operational FT	W&M (204)	September 20, 2012 at 08:46 am	Actions
Admin & Office Specialist III	Training Assistant MLD	Human Resources Office - 931000	00120W	Operational FT	W&M (204)	September 19, 2012 at 11:27 am	Actions

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 **Next>>** buttons to continue to the **Internal Documents** tab.

Editing Action

- Classification Details
- Position Details
- Job Duties
- Physical Demands
- Class/Comp Review
- Supervisory Position
- Budget Information**
- Internal Documents
- Employee Details
- Action Summary

Budget Information

[Check spelling](#) ▼

*** Required Information**

Time Sheet Approver Information

Time Sheet Approver's Position Number If Different from Supervisor

Budget Information

Agency

Position Description Effective Date

Banner Funding Source

A Minimum of ONE Entry is Required

* **Index**

* **Account**

* **Percent**

Activity Code

Remove Entry?

[Add Banner Funding Source Entry](#)

The Index, Account, Percent must be completed before you can move to next tab.

This is a builder form which allows you to add additional funding sources by clicking on "Add Banner Funding Source Entry" button.

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 [Actions](#) button next to the document type.

PLEASE NOTE:

* Hiring Officials need to attach the Org Chart

Documents can be uploaded by browsing for the document or a document can be written or previously selected.

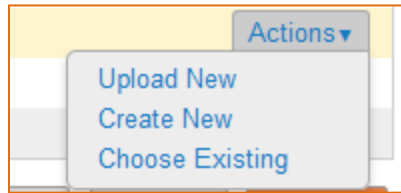
Document types that are supported as attachment include .doc, .docx, .pdf, .rtf, .rtx, .txt, .tiff, .tif, .jpeg, .jpe, .jpg, .png, .xls and .xlsx. All documents uploaded will be converted to .pdf for security.

PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
Organizational Chart (Required)			Actions ▼
Position/Budget Justification			Actions ▼
Memorandum			Actions ▼
Classification/Compensation Review Form			Actions ▼

[Save](#) [<< Prev](#) [Next >>](#)

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.

A screenshot of a web form titled 'Upload a test'. The form includes a text area for a description, a 'Name' field with the value 'test 10-03-12 08:23:52', a 'Description' field, a 'File to upload' field with a 'Browse...' button, and a 'Submit' button at the bottom.

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

A screenshot of a web form titled 'Create a New test'. The form includes a 'Name' field with the value 'test 10-03-12 08:27:32', a 'Description' field, and a rich text editor. The rich text editor has a toolbar with various formatting options like bold, italic, underline, and font color.

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

A screenshot of a web page section titled 'Your Previously Uploaded Documents'. Below the title is a rectangular box containing the text: 'A list of documents previously uploaded will appear here.'

Use [Next >>](#) 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.

Employee Details	
First Name	Mary
Last Name	Kay
Email	

Users - Filter these results

Ad hoc Search

Select User

Use **Next >>** buttons to continue to the **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 **Take Action on Action** button and the appropriate actions will appear available for you to choose.

Update/Reclassify Existing Staff/PPF Position Description / Custodial Supervisor / Summary

Update/Reclassify Existing Staff/PPF Position
Description: Custodial Supervisor (Staff/PPF) Edit

Current Status: Draft

Position Type: Staff/PPF
Department: Plant Administration - 951100

Created by: Hiring Official
Owner: Hiring Official

Take Action on Action

WORKFLOW ACTIONS

- Keep working on this Action
- Cancel Action (move to Canceled)
- Level 1 Review (move to Level 1 Review)

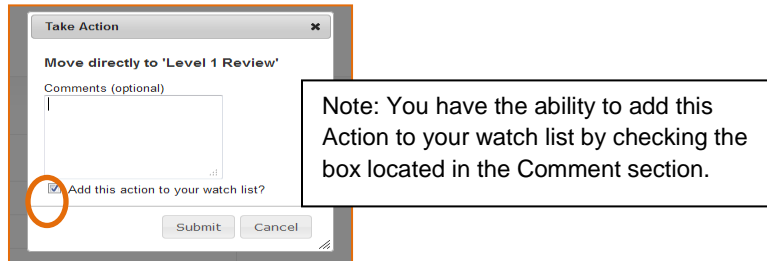
Classification Details Edit

Position Classification Details	
Role Title	HSPK & Apparel Serv Worker I
Role Code	79071
State Pay Band	
Role Specific Details	
Equal Opportunity Statement	William and Mary is an Equal Opportunity/Affirmative Action/Equal Access employer and actively encourages applications from minorities, women, disabled persons and veterans.

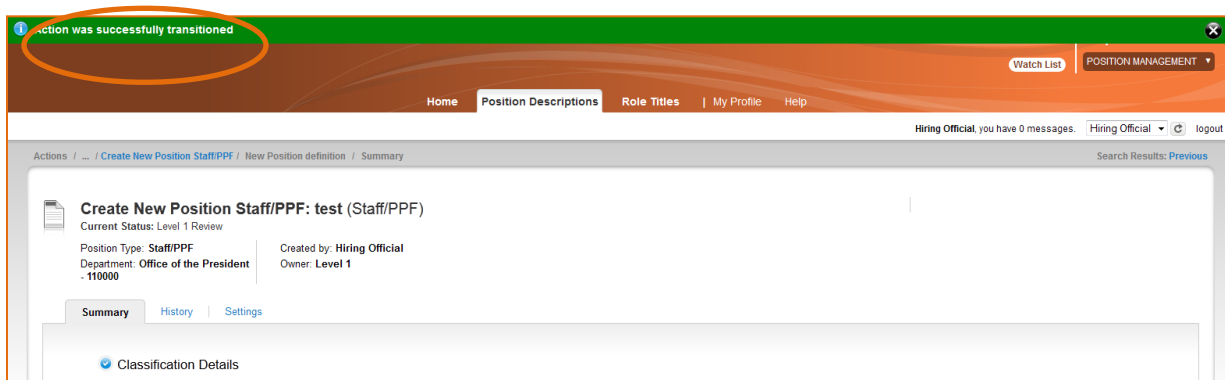
Position Details Edit

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**.



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.