Position Management

Creating a new position or updating an existing description

AskHR@wm.edu

Updated July 2021

Table of Contents

Topic	Page
Create a New Position Description	2
Classification Details	6
Position Details	7
Job Duties	10
Physical Demands Form	11
Supervisory Position	12
Budget Information	13
Internal Documents	15
Action Summary	17
Work Flow Processes	19

Create a New Position Description

Login to PeopleAdmin at https://jobs.wm.edu/hr; use your W&M credentials at the Single Sign On Link, not the guest user access.

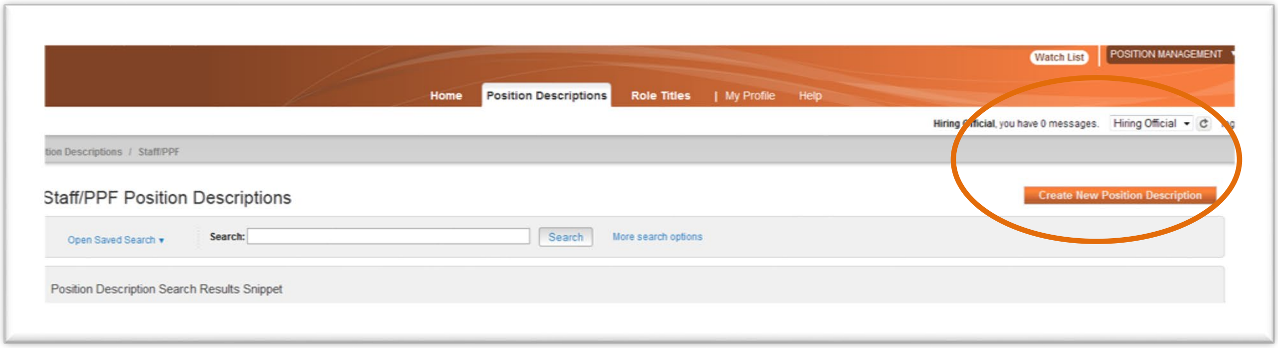
Requests for position changes, modifications, and update/reclassify are completed in the orange position management side; Requests for postings and hiring proposals are completed in the blue applicant tracking side.

Before a posting can be created, you must have an approved position description. To begin, select the Position Management module by hovering over the three blue dots in the upper left corner of the screen and select Position Management.

The heading of page will turn to orange.

- If you are creating a brand new position, and a skeleton or shell PD is not already loaded, follow the steps immediately below.
- **If the shell of the position description is loaded, follow the instructions to "Update/Reclassify"** beginning on page 5, below.

Hover over **Position Descriptions** in the orange bar and then select **"Staff/PPF Positon Descriptions**". Click **Create New Position Description** on the right hand side.

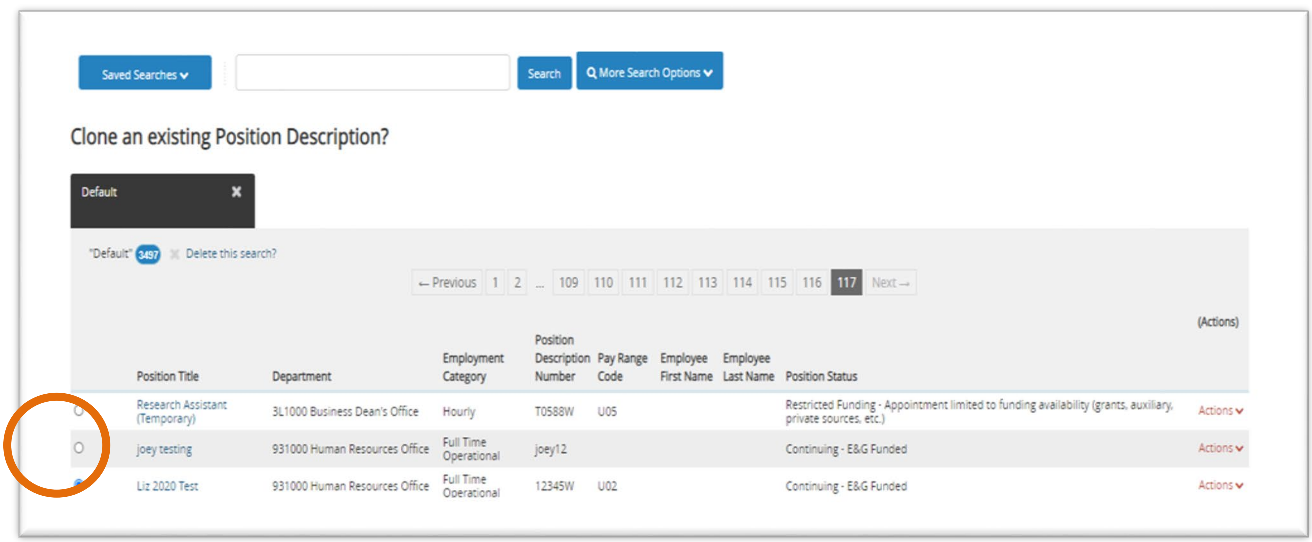


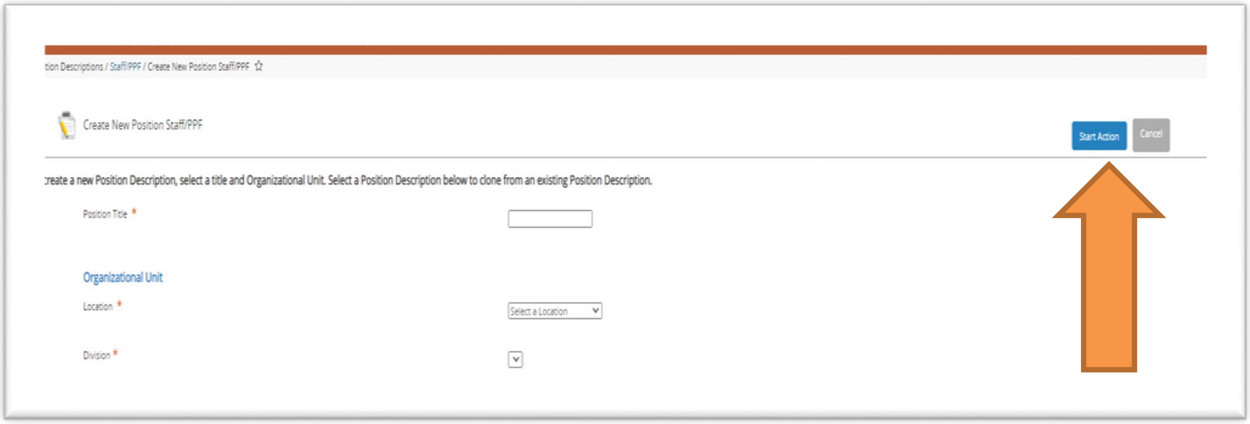
Fill in the required fields, then click on **start action.** New positions can either be **cloned** (copied) from an existing position description or **created from scratch**.

To create a new position by <u>cloning</u> an existing position:

1. Identify the position to be cloned from the list of Approved Position Descriptions at the bottom of the screen. You can enter a title or position number to search and shorten the list.
2. Click the radio button next to the selected position description.
3. Click the **start action** button in the top right section.

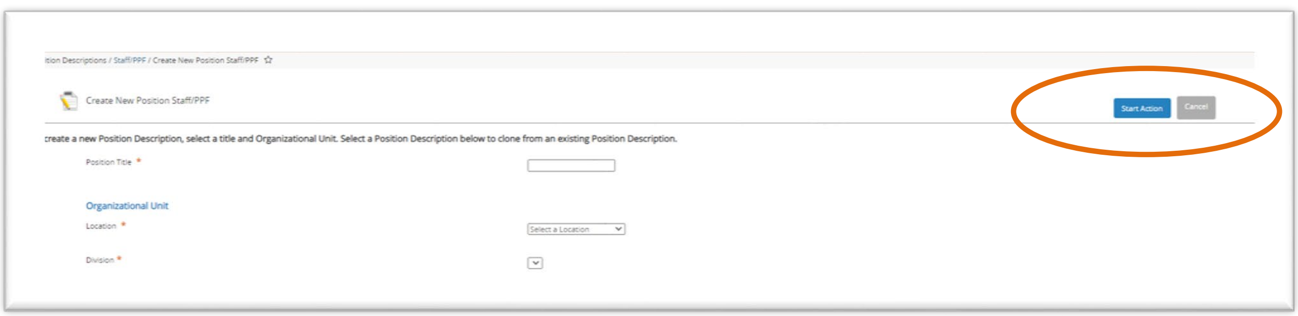
NOTE: The fields on the new position will pre-populate with all the information from the existing position (except the position number) and can be edited as needed.





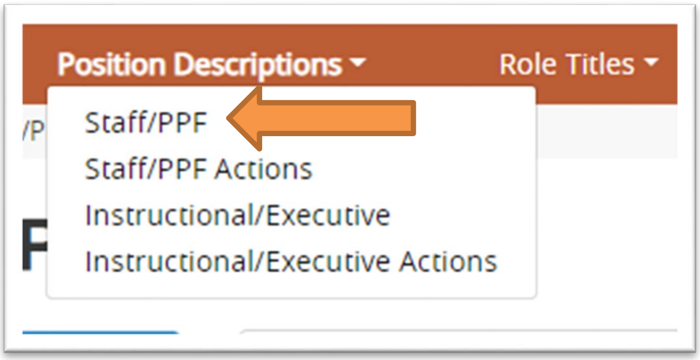
To create a new position from scratch:

1. Enter the working/internal title in the **Position Title** field.
2. Select the organizational Location, Division and Department from the drop down boxes. .
3. Click on the start acton button in the top right section. Once you select start action the position description will be locked for editing.

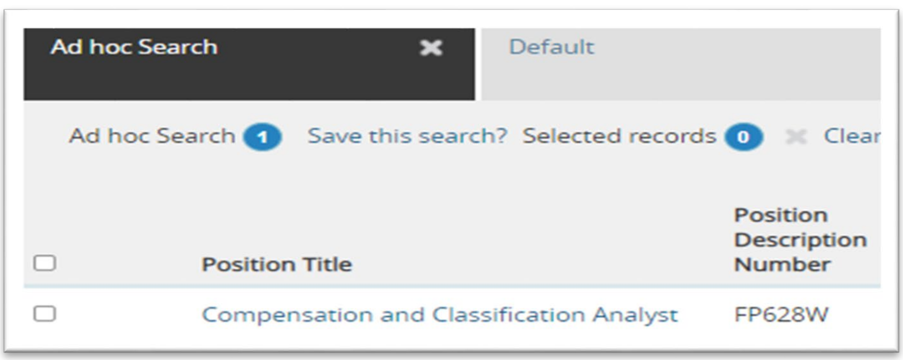


To update a position that already exists:

1. Following the steps above, navigate to the Position Management module.
2. In the orange bar, click on **Position Descriptions > Staff/PPF**



3. You will see a list of positions that you have access to. Look through the list to find the position you want to update. If you have a long list you can also enter the position number in the search bar.
4. Click on the position title, which will be a hyperlink, to open the position.
    a. **Tip**: If you are not seeing a position title, you may need to add columns by expanding the blue **More Search Options** button, click on **Add Column** drop down box and select Position Title field.



5. After you click on the title, click on the link on the right hand side to **update/reclassify existing staff/ppf position description.**

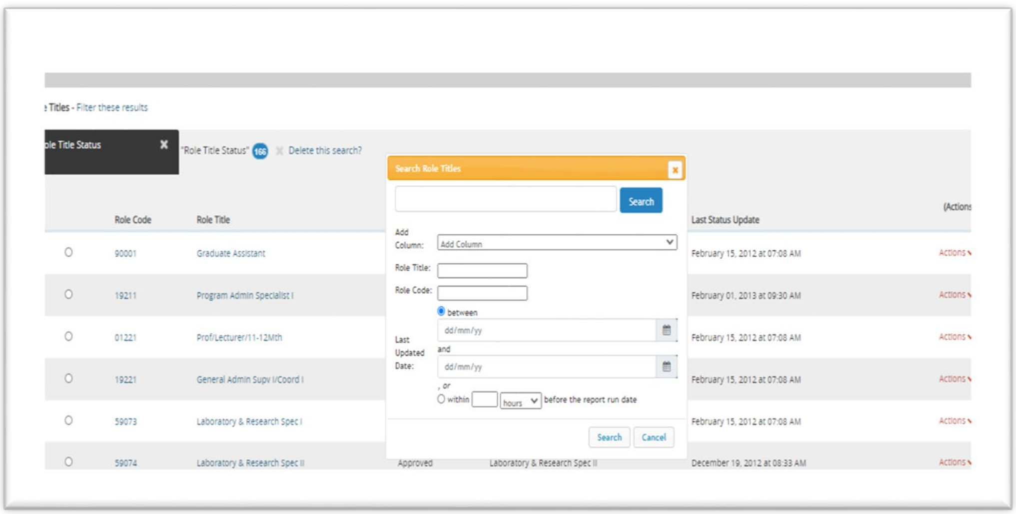
6. You are now ready to begin updating the position.

The following instructions apply to both “Create New” and “Update/Reclassify” requests.

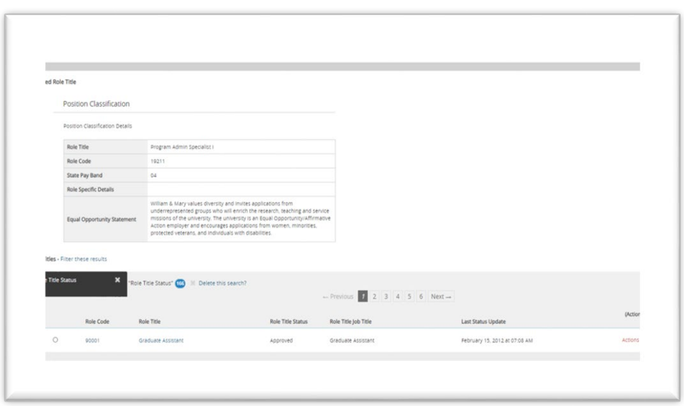
Classification Details

You may skip this step if you do not know the role title, or, you may propose and select a role title by scrolling through the list of Role Titles or creating a filtered search. To create a filtered search click on **“Filter these results**” and a feature box will pop-up to enter criteria. The role title will default for cloned positions.

Note: The final determination of Role Titles is based on a classification/compensation review by Human Resources.



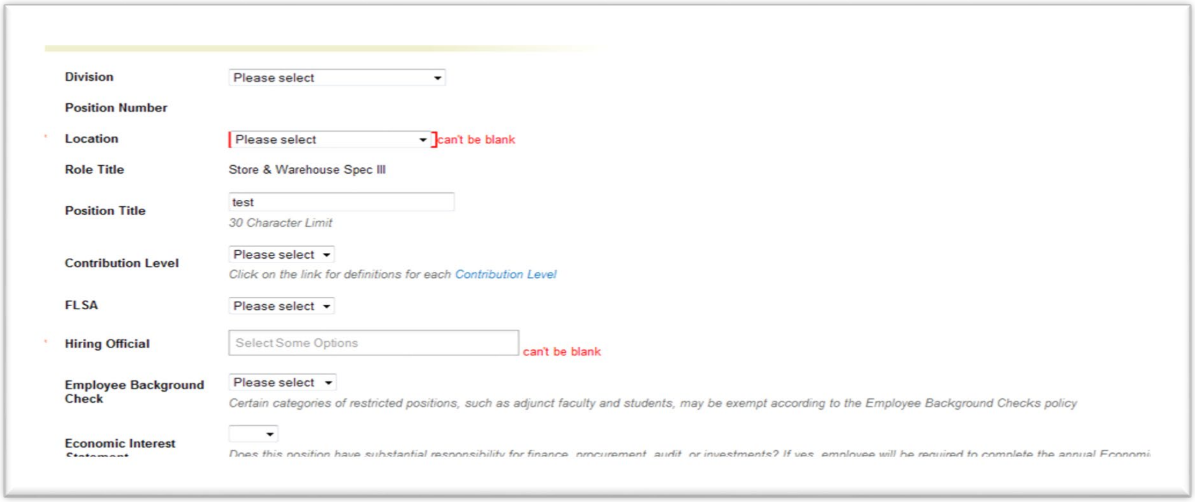
Click the radio button next to the selected Role Title and click the **Save & Continue** button in the top right corner to go to the Position Details tab.



Position Details

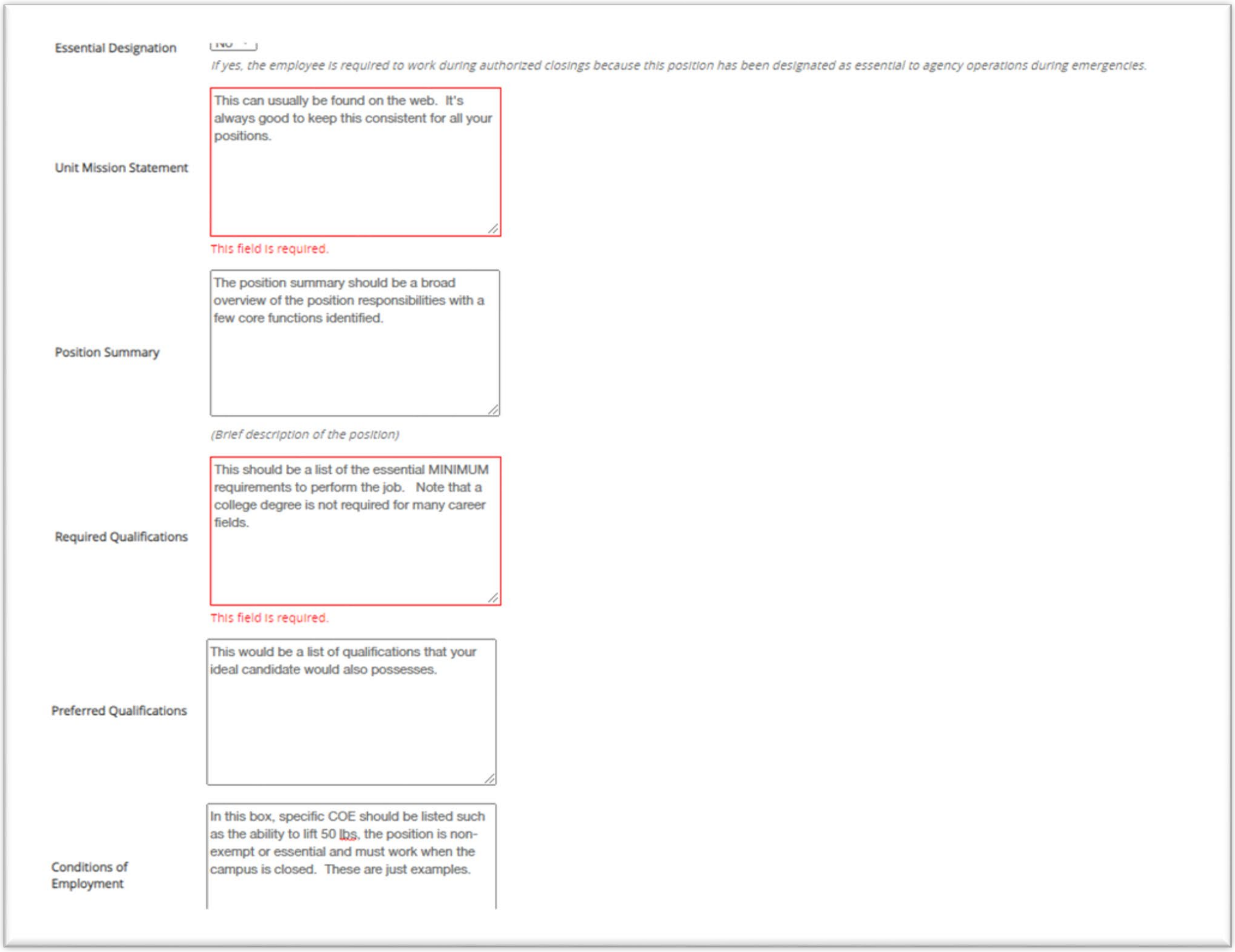
Complete all required information that did not default from Classification Details.

TIP: you can add additional hiring officials if needed as long as they already have that role.



TIP: Your unit mission summary can usually be found on the web.
TIP: The position summary should be a broad overview of the position responsibilities with a few core items highlighted.
TIP: Required qualifications are the essential MINIMUM requirements to perform the job. Note that a college degree is not required for many career fields.
TIP: Preferred qualficiations would be a list of qualifications that your ideal candidate would also possesses.
TIP: Conditions of Employment include such items as the ability to lift 50 lbs, the position is non-exempt or essential and must work when the campus is closed. These are just examples.

HR will review and recommend qualfications and COE based on the position duties and responsibilities.



Click **Save & Continue** when you are ready.

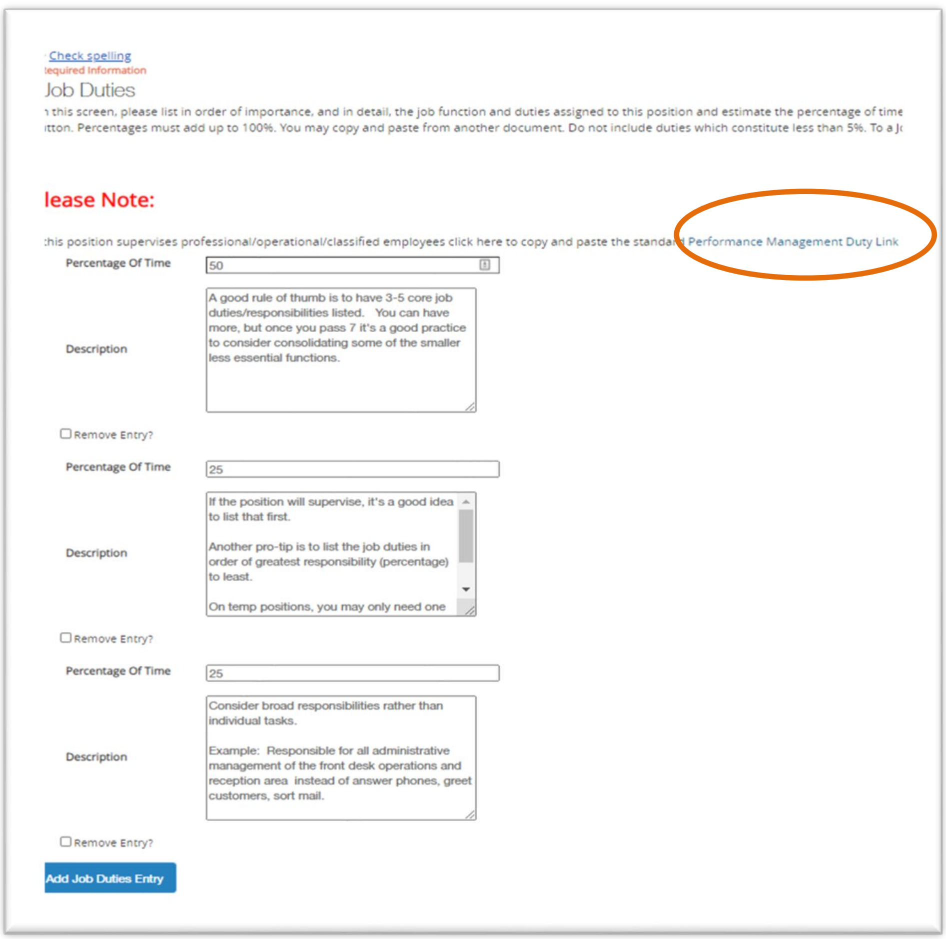
Job Duties

Click on **add job duties button** to enter the specific job duties.

TIP: You can enlarge or shrink the job duties box by dragging the lower right corner of the box!

TIP: Often supervisors like to create a rough draft in Word and then use that to copy/paste into PeopleAdmin to allow for editing prior to submission.

1. Enter the percentage of time for the job duty and provide a description. Duties must be at least 5% to be listed and considered towards the classification of the position.
2. If the position supervises click the **Performance Management Duty Link** to copy and paste the standard Performance Management description.
3. Click **add Job Duties Entry button** until all duties have been added.
4. To remove an entry, check the **Remove Entry** box and click on **Save**.
5. After all duties have been added, enter the total percentage, the total must add to 100%.
6. Click **Save and Continue**



TIP: A good rule of thumb is to have 3-5 core job duties/responsibilities listed. You can have more, but once you pass seven duties, it's a good practice to consider consolidating some of the smaller less essential functions.

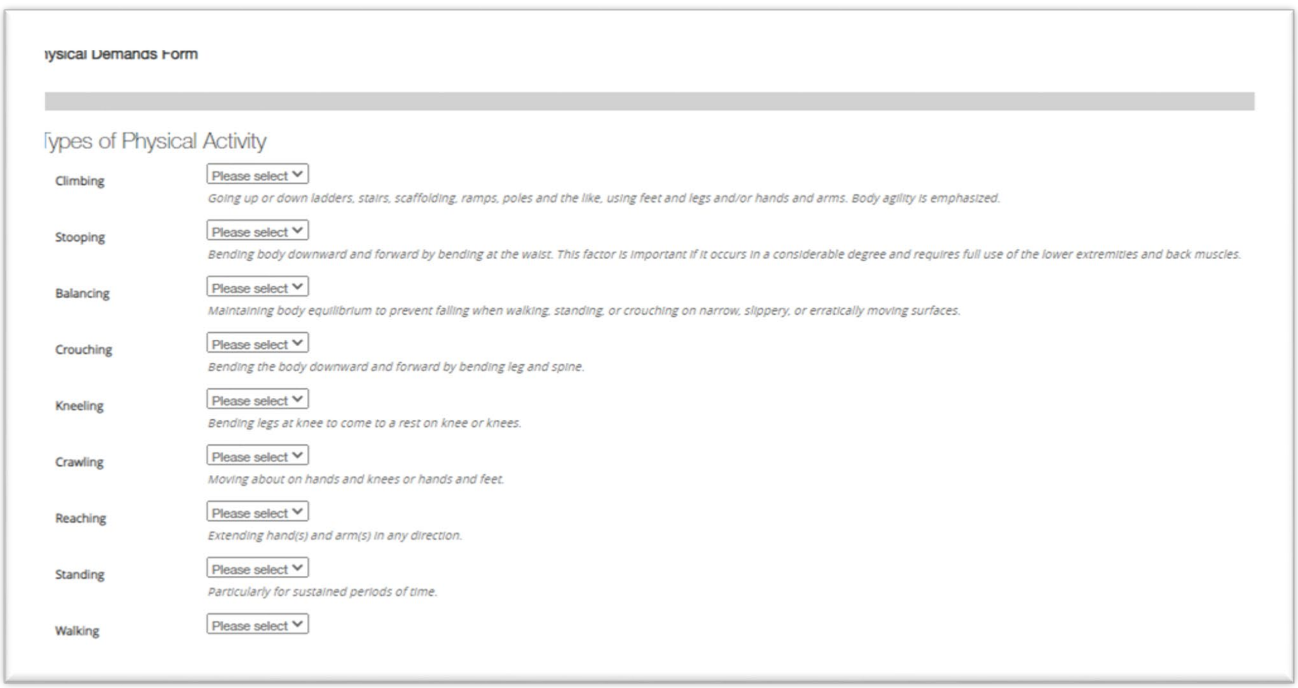
TIP: If the position will supervise, it is a good idea to list that first. Another pro-tip is to list the job duties in order of greatest responsibility (percentage) to least. On temp positions, you may only need one job duty listed.

TIP: Consider broad responsibilities rather than individual tasks.

Physical Demands Form

Select the applicable 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.

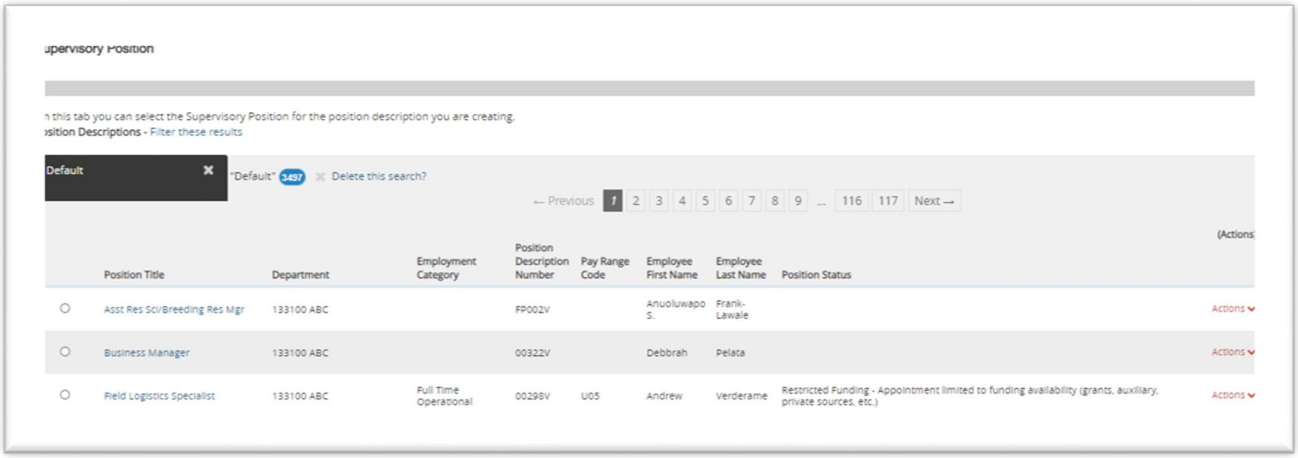
TIP: Use the arrows on your keyboard  to tab through the selection list or "Hot Keys" by entering "O" for occasionally, "F" for frequently or "C" for constantly.

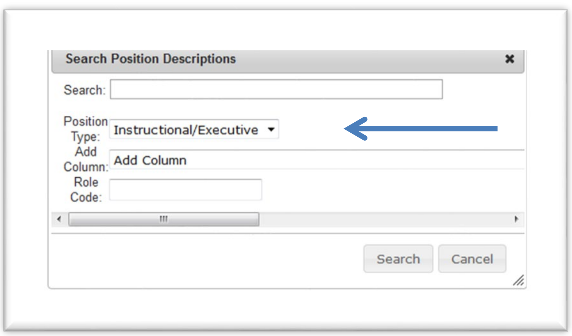


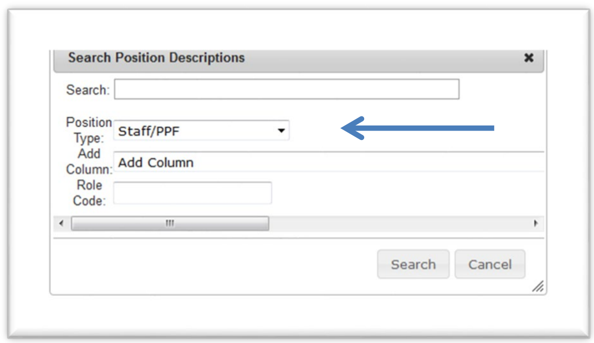
When the Physical Demands has been completed **select Save and Continue.**

Supervisory Position

Select the Supervisory Position from the list of Approved Position Descriptions. **For executive /instructional supervisors positions, change the position type to Instructional/Executive**.





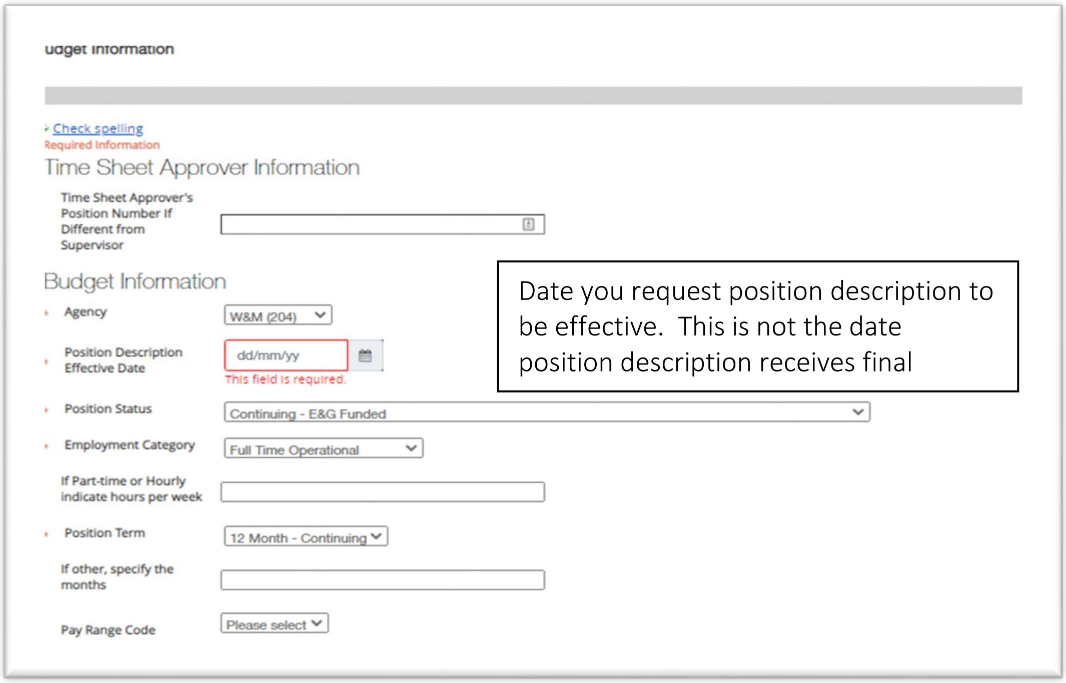


Click **Save and Continue**.

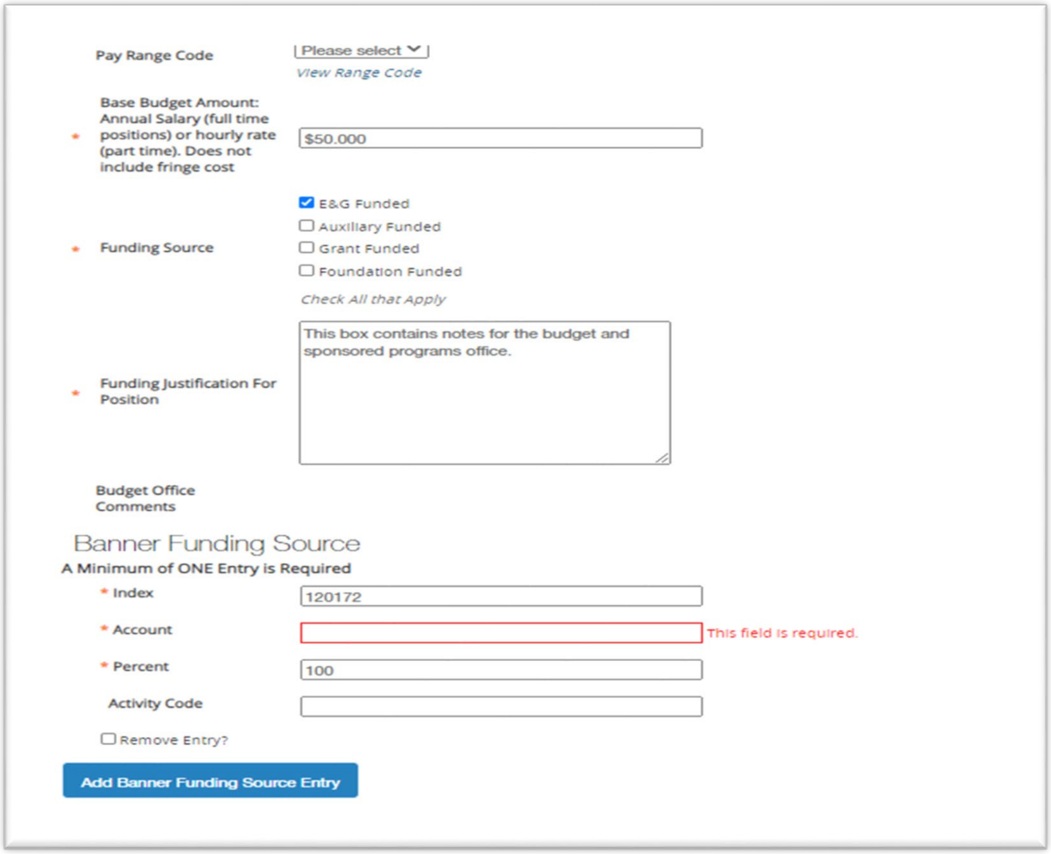
Budget Information

Complete all required information.

TIP: Questions on funding sources and account codes should be directed to your budget analyst or sponsored programs administrator in central office.



TIP: The base budget is the amount of base salary budgeted for the position; it is NOT a guarantee of the rate or salary that will be paid to the candidate hired.



Pay Range Code — Please select
View Range Code

* Base Budget Amount: Annual Salary (full time positions) or hourly rate (part time). Does not include fringe cost — $50.000

* Funding Source
- [x] E&G Funded
- [ ] Auxiliary Funded
- [ ] Grant Funded
- [ ] Foundation Funded

Check All that Apply

* Funding Justification For Position — This box contains notes for the budget and sponsored programs office.

Budget Office Comments

Banner Funding Source

A Minimum of ONE Entry is Required

* Index — 120172

* Account — This field is required.

* Percent — 100

Activity Code

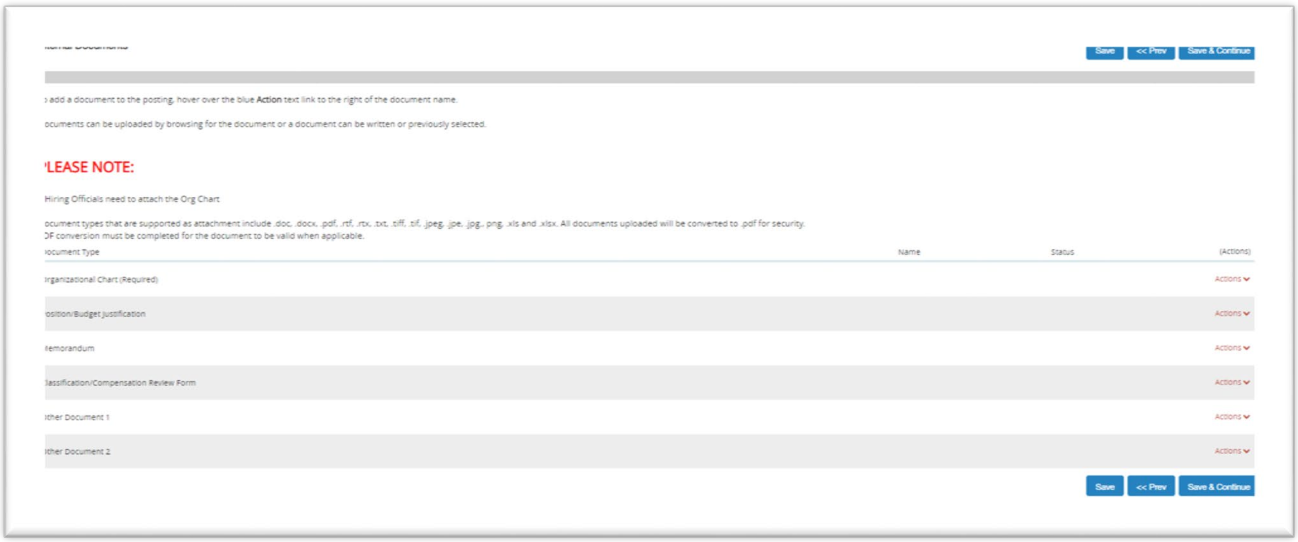
- [ ] Remove Entry?

Add Banner Funding Source Entry

Internal Documents

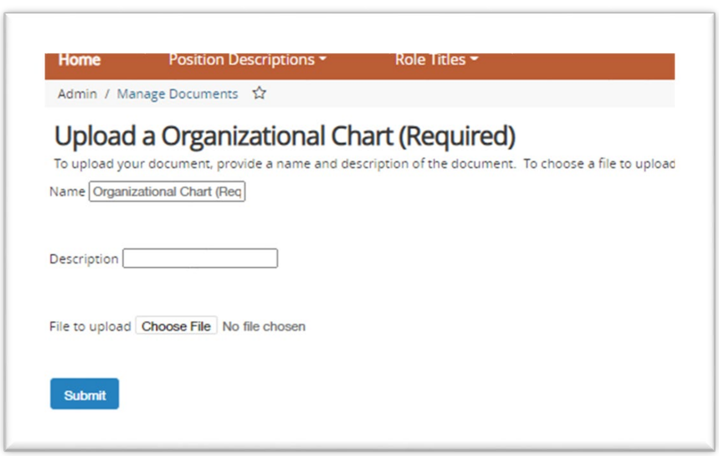
Updated organization charts are required for all position actions.   Other documents may also be attached, i.e., relevant memos, position budget justification, etc. To attach a document, hover the cursor over the Actions▾ button next to the document type.

The following drop down choices will appear for you to select:



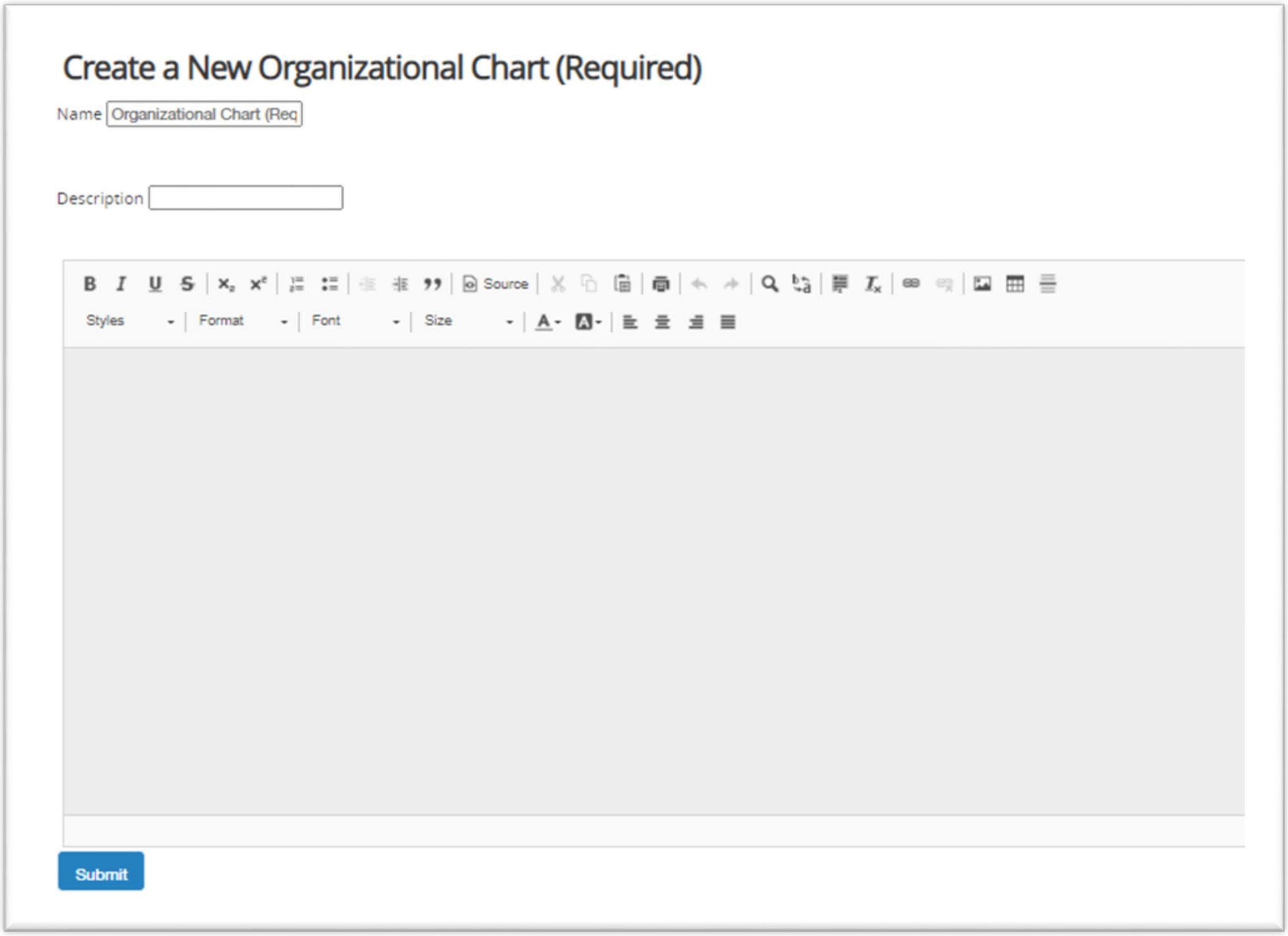
Select **Upload New** to upload a document from your files. Search or the document on your computer and click on submit.

All uploaded files must be converted to PDF and you should see a message “PDF Complete” when the files have successfully uploaded.

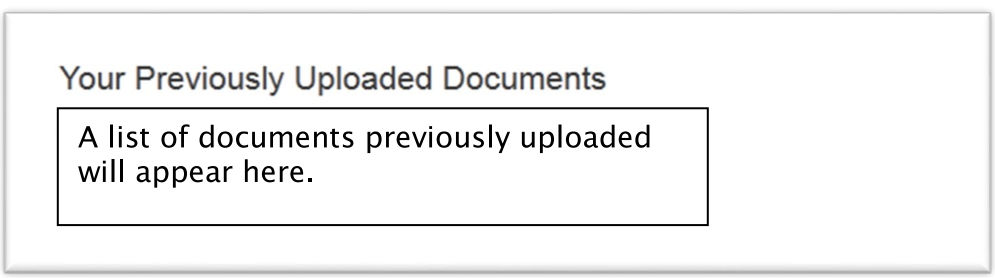


Note: Only the user that uploaded a document can remove the document.

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



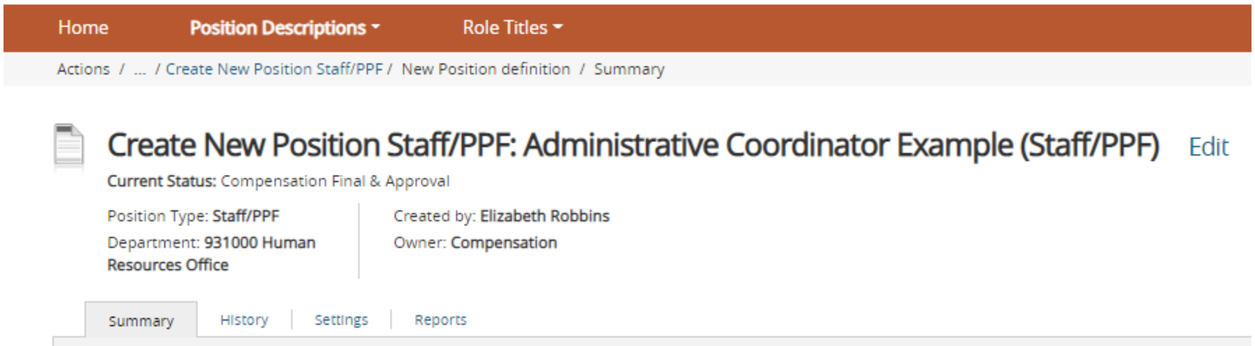
Select **Choose Existing** to link a document that was previously attached by selecting the document from the list, then click on Submit, then Confirm.



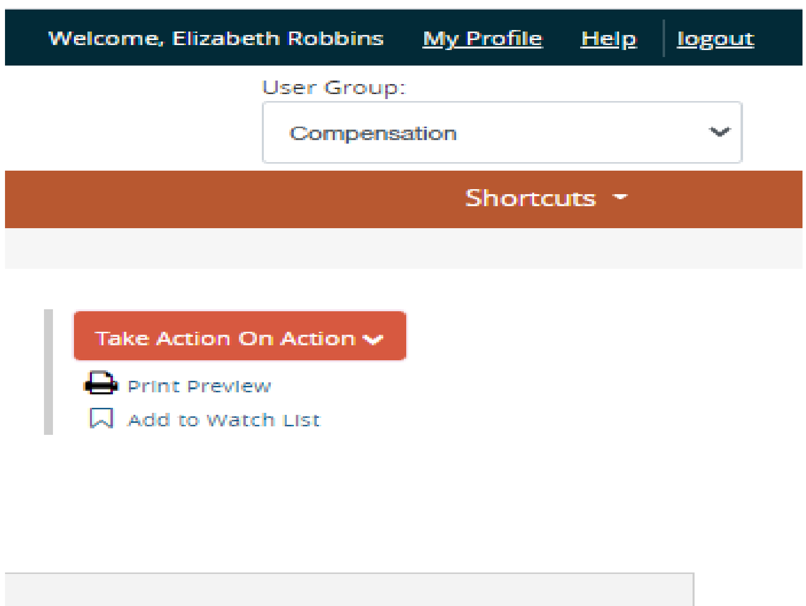
Click **Save & Continue**.

Action Summary

The Action Summary tab provides the opportunity to review the position request and make any changes before submitting it for further approval. The top section provides information about the action, i.e. current status, position type, who created the action and the owner, etc.



To initiate the approval queue, click the **Take Action on Action** button and chose from the list of available actions.



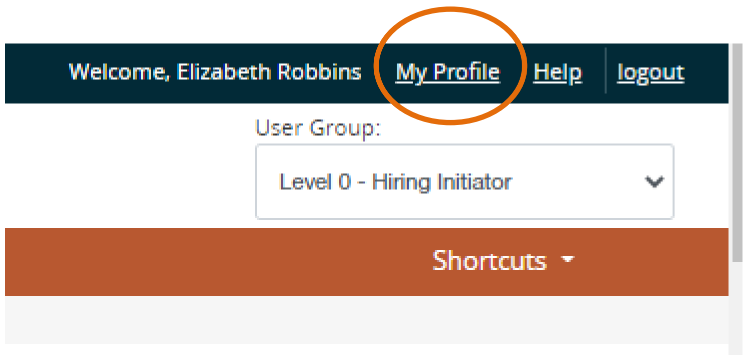
Once the Action is selected, a comment box will appear and a comment may be added that will be incorporated into the e-mail notification sent to the next approver. Comments to include may such items as "this is a copy of position ABC456" or "we have identified ca candidate for this temp position."   **Please keep in mind these comments will become part of the position record and cannot be removed**.

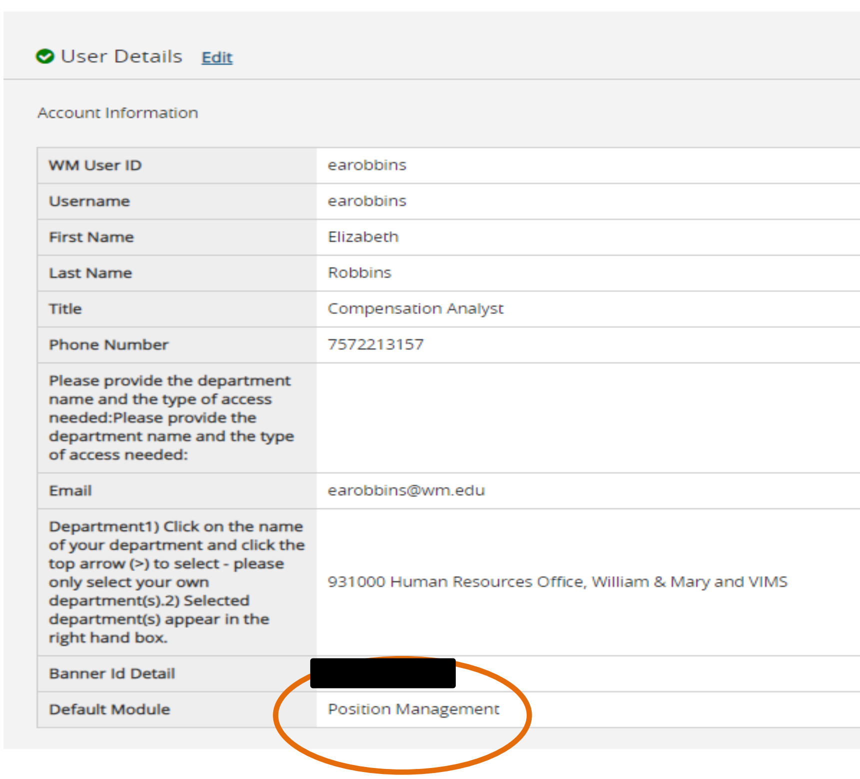
If you want to monitor the progress and easily access it later, add the action to your watch list. You will be able to view it quickly from your home screen. Select **Submit** to move the action to the next stage of processing. **Do NOT click on an action in your watch list to make changes after you have started routing the action for approval**. Once the action leaves your box, you need to have sent back to you to make changes.

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.

Other Tips & Tricks:

You can also set your default log on and role to be position management by clicking on "My Profile" in the top:




User Details Edit

Account Information

WM User ID	earobbins
Username	earobbins
First Name	Elizabeth
Last Name	Robbins
Title	Compensation Analyst
Phone Number	7572213157
Please provide the department name and the type of access needed:Please provide the department name and the type of access needed:	
Email	earobbins@wm.edu
Department1) Click on the name of your department and click the top arrow (>) to select - please only select your own department(s).2) Selected department(s) appear in the right hand box.	931000 Human Resources Office, William & Mary and VIMS
Banner Id Detail	[redacted]
Default Module	Position Management

WORK FLOW PROCESSES – Create New Staff/PPF Position:

1. Hiring Official creates, routes to Level 1 (Department approval)
2. Level 1 routes to Level 2 (Division approval)
3. Level 2 routes to Class/Comp Initial Review
4. C/C reviews and classifies, routes to funding office
5. Funding – Budget, OSP, or Investment Admin verifies funds, sends to Comp Final Review
    - *Funding has the option to return an action to the hiring official for correction/revisions to budget and accounting information.
6. Class/Comp finalizes, moves to one of two steps:
    - Sent to Employment for posting if the position will be recruited. The Hiring Official Notified and Employment notified to create a Posting via system generated email
    - OR finalizes PD and provides a memo to document any changes from a class/comp review.