

Position Management User Guide

PRODUCTION SITES

<http://employment.ucdavis.edu/hr> (Internal Site)
<http://employment.ucdavis.edu> (Applicant Site)

TRAINING SITES

<http://training030.peopleadmin.com/hr> (Internal Site)
<http://training030.peopleadmin.com> (Applicant Site)

PeopleAdmin Helpdesk
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SECTION 1: INTRODUCTION

PeopleAdmin serves four main purposes for departmental users:

1. **Position Management:** Each budgeted provision will have a unique permanent position number, that it will retain over time, whether vacant or filled, when reclassified, and through various other changes. A new action number is assigned for each action taken (e.g., stipend, reclassification, etc.), but the position number will not change.
2. **Position Description Library:** Once approved, a position description is retained in the Library, with its unique position number. It can be accessed there for use to initiate various personnel actions.
3. **Compensation Actions:** PSS and MSP position actions including classification review, stipend, equity and position description updates and approvals are handled through PeopleAdmin.
4. **Recruitment and Hiring Actions:** Using an approved position description from the Library, the department can accomplish various tasks related to hiring such as initiating recruitment or confirming a hiring decision. For details on the Recruitment process refer to the *Requisition/Recruitment and User Guide*.

PeopleAdmin has two primary modules:

1. Position Management, in which actions such as creating or editing position descriptions, vacating or inactivating positions, or managing compensation actions are accomplished.
2. Recruitment, in which the department can initiate and process all types of recruitments, by using a position description approved to the Library in the Position Management mode. For details on the Recruitment process refer to the *Requisition/Recruitment and User Guide*.

1.1 Key Features

- PeopleAdmin **separates Position Management and Recruitment into two distinct processes**; first, a position description needs to be created and submitted to the Campus Library in Position Management; second, a request to post a vacant position needs to be created under the Requisition/Recruitment menu.
- All **classification reviews and compensation requests** must be initiated and **submitted through PeopleAdmin**.
- **Numbering Scheme**
 - Each action request is assigned an **Action Number**, beginning with **01**.
 - Each budgeted provision is assigned a unique **Position Number**, beginning with **02**. This assigned position number never changes through the life of that provision even if over time the duties/payroll title, incumbent, supervisor, etc. changes.
- **Copying Positions** is streamlined and easy. **Users have access to** a library of position descriptions to use as templates or guides.
- **Essential Responsibilities** are collected in a single data field with a character limit of 3900. Headings and percentages are required. Enter responsibilities in order of importance in either paragraph or list format.
- **Physical Demands** of the position (i.e., agility, endurance, strength) are described in accordance with ADA compliance.
- **Work Environment** is the environmental factors that influence the work; including conditions of employment and licenses required by law to perform specific duties.
- **Qualifications** are separated into two categories:
 - **Minimum Qualifications** - **minimum** experience, knowledge, skills, or credentials required on day one of the job.
 - **Preferred Qualifications** - the **additional** experience, knowledge, skills or abilities which are desired, but not absolutely necessary to begin work, or which can be acquired after the incumbent starts on the job.
- **Job Expectations** are how supervisors expect the work to be performed. If used, do not list or repeat skills, knowledge, abilities, or experience. When used, describe performance and/or behavior-related expectations.
- **Decision Details** - Compensation will provide details on the compensation or classification decision. The details of the request and decision are stored in Historical for future reference after Compensation concludes the review.
- **Search Actions** provides users with a **real-time view of all actions** in process and their status.
- **One position library** with two views:
 - **Department Library** - view position descriptions and details of actions for a particular department.
 - **Campus Library** – view position descriptions for ALL departments.

- **Signed copies of position descriptions are to be stored in the department.** The official document of record is stored in PeopleAdmin.
- **Update Employee and Supervisor Information** - Manage changes for supervisor name, department name, and employee last name, or correct an employee ID number, without HR review.
- **Vacate Position** to keep department records up-to-date. When an incumbent issues their intent to resign, retire, etc., department users can set the status of a provision to “Open Position” in order to remove the incumbent’s name and prepare the position for refill. When an incumbent’s STE or Contract ends, department users can set the status of a provision to “Provision Eliminated” to indicate the position as inactive.

1.2 Purpose of a Position Description

Basis of your search for a new hire

By clearly defining the job up front in writing, and using that document to make sure candidates know what the job entails, you will have already established and communicated the requirements for success.

Interview tool

Once you have the job outlined, you can build your set of interview questions around the job’s actual requirements—which will not only help you find a great hire, but also help you steer clear of topics that could lead to legal trouble, such as an applicant’s disabilities or private life. And when it’s time to choose from your pool of applicants, you will already know exactly what qualities and skills the successful candidate should have.

Provides immediate understanding of what you and the organization expect

By explaining what the job requires up front, before an applicant accepts the offer, you can eliminate much of the fear, uncertainty, and doubt that often accompany the decision to accept a new job.

Basis for solid performance management

Once your employee is on board, you can use the very same job description you used in the hiring process to explain what constitutes success in the job. You can measure how an employee is doing against those expectations and help an employee get back on track, if necessary, simply by referring back to the job description. Keeping the position description up to date as the position changes will help you coach your employees and give you standards by which to measure performance fairly and accurately as positions and responsibilities change.

Determine pay levels

By accurately describing what a job entails, and the skills, credentials, and other qualifications necessary, a position description gives your human resources department a solid way to measure the value of a job and set the pay accordingly. The position description gives HR a way to compare this job to other positions in the organization when setting pay rates.

Limit legal exposure

If you clearly understand what you are looking for in a position and focus solely on those criteria when filling the job, you will be much less likely to base your hiring decisions on factors that aren’t job related.

Your interview questions will be relevant only to the job, and your hiring choices (and performance management decisions) will be based on the person’s qualifications and ability to do the job—not on his or her personal characteristics or beliefs, and not on your personal likes or dislikes. This is critical in maintaining a bias-free workplace where employees are treated fairly and consistently.

Summary

A position description is a:

- Hiring document
- Tool for measuring and managing performance
- Basis for both disciplinary action and celebration of accomplishments
- Organizational system to make sure that employees and managers are on the same page with regard to expectations
- Important part of a university’s legal defense if a former employee files a discrimination or wrongful termination claim

1.3 Federal and State Laws that Impact a Position Description

Federal law prohibits discrimination on the basis of

- race
- color
- national origin
- religion
- sex (including pregnancy)
- citizenship status
- age (for employees who are at least 40)
- disability

Applicable Federal laws:

- Title VII of the Civil Rights Act
- Age Discrimination in Employment Act (ADEA)
- Equal Pay Act
- Immigration Reform and Control Act
- Americans with Disabilities Act
- Fair Labor Standards Act (FLSA)

California State law prohibits discrimination on the basis of:

- Age (40 and older)
- Ancestry or national origin
- Physical or mental Disability
- AIDS/HIV
- Gender
- Marital status
- Pregnancy, childbirth and related medical conditions
- Race or color
- Sexual Orientation
- Genetic Information
- Medical conditions
- Political Activities or affiliations

Applicable Government Codes are: 12920, 12940, 12941, 12945, and 12926.1
California Labor Code 1101

SECTION 2: ADMINISTRATION

2.1 Department User Roles

Department Initiator

Initiate a position review, stipend or equity, and submit for departmental approval.

Initiate a position for any staff recruitment (PSS, MSP, career, short-term, waiver, contract, etc.), and submit for departmental approval.

Manage a department recruitment (including activate guest users, screen applicants, create a hiring decision, and close the recruitment), per inclusion via Department Initiators with access.

View all pending and historical recruitments, per inclusion via Department Initiators with access.

View the campus position library and department library.

Position Management Approver 1

Initiate and submit to Approver 2 for approval, a position review, stipend or equity.

Update an employee last name, supervisor, and department or user access on a department position (no HR approval necessary).

Vacate current employee (incumbent) on a department position (no HR approval necessary).

View all pending and historical position actions.

View the campus and department position library.

Recruitment Approver 1

Initiate and submit to Employment, a requisition for a staff position.

Manage a department recruitment (including activate guest users, screen applicants, create a hiring decision, and close the recruitment).

View all pending and historical recruitments.

View the campus position library.

Department Approver 2

Initiate and submit to Compensation, a position review, stipend or equity.

Update an employee last name, supervisor, and department or user access on a department position (no HR approval necessary.)

Vacate current employee (incumbent) on a department position (no HR approval necessary).

Initiate and submit to Employment, a requisition for a staff position.

Manage a department recruitment (including activate guest users, screen applicants, create a hiring decision, and close the recruitment).

View all pending and historical position actions and recruitments.

View the campus and department position library.

Guest User

View an open recruitment and applicant pool once they have been given a Guest Username and password.

2.2 Add, Update, or Inactivate Department Users

Add a Department User

Go to the PeopleAdmin log-in page www.employment.ucdavis.edu/hr

Select "**CREATE/AUTHORIZE**" and complete all information fields. Click [CONTINUE] and [CONFIRM]. The request will route and be approved by the PeopleAdmin Administrator.

Update or Inactivate a Department User

Email pahelp@ucdavis.edu; include your name, phone number, department and your change request.

SECTION 3: PEOPLEADMIN NAVIGATION

3.1 Navigation

PeopleAdmin Site Addresses

Production Site

<http://employment.ucdavis.edu/hr> (Internal site)

<http://employment.ucdavis.edu> (Applicant site)

Training Site

<http://training030.peopleadmin.com/hr> (Internal site)

<http://training030.peopleadmin.com> (Applicant site)

Login - Your login is your Kerberos Login ID and passphrase for both the training and production sites.

Navigating the Site

Do not use the Browser Back Arrow when working in the edit mode; you will lose your edits. When in edit mode, use PeopleAdmin navigation tools provided within the application.

Navigate using Mouse or Touch Pad - to navigate from a menu box, use your tab key or your mouse. To click the next data field or select tabs at top of page use your mouse.

Do not use the Scroll Feature on the Mouse – doing so while in a menu field will change your menu selection.

Toggle from Edit view to Summary View – click “Edit” to go to the tab view in an action. Select [Preview Action] to go to View Summary, to submit an action or to print an action.

Required Fields “*” - required fields are marked with a red asterisk “*” which indicates the data field must be completed to save, move to the next page, or to submit the action.

Sort Tables Using Up/Down Arrows (i.e., Pending Action, Search Actions, Historical, and Department and Campus Library) – click the arrow in any column to sort the records by alpha/numeric or reverse alpha/numeric.

3.2 Position Management Menu

The following describes the position management menu located on the left side of your screen:

Begin New Action Use this link to start a new action; select an action from the listed menu. Below are actions that can be initiated:

New Position – Use this action to submit a new position description for a review and append it to the library.

Modify Existing Position – Use this action to initiate an action for a current employee such as a classification review, stipend or equity.

Update Employee and Supervisor Information – Use this action to update employee last name, supervisor information, and users with access and then return the position to the library.

Vacate Position – Use this action to remove a previous incumbent’s name from a position and mark the provision in the library as open or eliminated.

Search Actions (Stores Actions that are in Progress) Use this to conduct a search and view all actions currently in process.

Pending Approval (Stores Your Work) Use this to edit or view actions that require your attention. After an action has been created and saved this is where the action will be stored. When an action is created, saved, and submitted to an Approver 1 or 2, this is where they will find the action.

Note: Only a Department Approver 2 can submit a position action directly to Compensation.

Historical (Stores Completed Actions) After HR concludes review of an action, saves and submits to the library, the action is stored here. Use this to retrieve a summary of an action, copy and paste PPS information to forward to a processor, or review comments provided on the review outcome.

Department Library (Stores All Positions in Your Department) Use this to search to view positions in your department. When an action is submitted to the library, the system deposits only the Position Description elements from the action into the Department Library. The system adds the action to the position's history.

Campus Library (Stores Classified Position Descriptions) Use this to search and view all positions on campus that have gone through some review by HR. **Note: The Campus Library does not contain incumbent name or any position history.**

3.3 Tracking Numbers

Action Number (01...) – a action number is generated each time an action is initiated and saved against a position. A position will have many action numbers over its life cycle.

Position Number (02...) – a unique position number was generated for each incumbent, in an active career staff appointment on 10/27/08, in your department for production rollout. A position number will be assigned for each new position created and saved to the library by Compensation. A position will only have **one** position number over its life cycle even if over time the duties/payroll title, incumbent, supervisor, etc. change.

Requisition Number (03...) – a requisition number is generated for each requisition posted for an open recruitment or direct hire. A position may have many requisition numbers over its life cycle.

SECTION 4: STEP-BY-STEP USER GUIDES

4.1 Modify Existing Position and Submit an Action

Note:

- All employees active in PPS prior to 10/27/08 were preloaded into the department library and assigned a position number. The information populated from PPS includes: Employee First and Last Name, Employee ID, Title Code, and Department Name. Since PPS does not store essential functions or department organizational information, the department will have to enter this information.

- It is very important that users pay full attention to the details at this point of the process because after a position description is approved and submitted to the Library, the contents that pull forward into a requisition cannot be altered when in requisition mode. If edits are required when in requisition mode, start this process again.

Steps to start an action for employees with a PeopleAdmin record in your Department Library. This is where most of the work performed in a Department will begin.

STEPS

1. From menu located on the left side of your screen, under POSITION MANAGEMENT, click "Begin New Action". Click "Start Action" under **Modify Existing Position**.

2. Use the search criteria to locate the position or choose [Search] to view all positions available to you.

3. Select "Start Action" below the Payroll Title. Then follow the screens shown below. Select [continue to next] or select the appropriate tab towards the top of the screen.

Justification (tab)	
Action Number	Assigned by the system for each position request. Action Numbers begin with 01. The action number is created upon save or submission to an approver. The user does not need to do anything in this field.
Action Type:	<p>Select one of the following:</p> <p>Review– Recruitment-Use when a position becomes vacant (replacement vacancy) whether requesting the same or a different classification or when authorized to create a new position to fill.</p> <p>Review– Reclass-Use for a Classification Study Request of a position with an existing employee.</p> <p>Review– Update-Use for an Update Review of a position with an existing employee; no significant changes in duties or populating position in Library for the first time.</p> <p>Equity - Permanent salary adjustment. Select this to request a review for a salary adjustment outside of the normal salary programs. For Equity Guidelines refer to: http://www.hr.ucdavis.edu/Comp/Equity_Adjustments</p> <p>Stipend -A temporary salary adjustment. Select this to request approval for a temporary salary increase for an employee assigned temporary responsibilities of a higher classification than their own or for assuming other significant duties. For the specific guidelines for policy or collective bargaining agreement language please refer to the "Out-of-Classification" articles in the collective bargaining agreements or PPSM 30 Salary for policy covered positions refer to: http://www.hr.ucdavis.edu/Elr/Policy</p>

Justification for Request:	<p>Provide sufficient information to explain the request. Compensation needs to understand what they are being asked to do and to prioritize work received. Provide a full explanation as described here.</p> <p>Include in your explanation for the request, if applicable:</p> <ul style="list-style-type: none"> % of Appointment New Vacancy Replacement Vacancy – Who? Short Term Employment – Who? Duration? Waiver of Recruitment – Who? Why? PSS or MSP Contract – Who? Duration? Reclassification – Why? When? Briefly describe the changes. Update – Briefly describe what changes are being made, if any. Stipend – Monthly amount, begin and end dates. Equity – Rationale for the request, approved by whom? <p>ADDITIONAL REFERENCES</p> <p>Reclassification Considerations:</p> <ul style="list-style-type: none"> Position has undergone significant changes in level of responsibility since last reviewed. Position has changed in the nature, variety, and difficulty of work. Position has changed in the supervision exercised. Employees typically retain 30% of their prior duties.
Contact Information	<p>Include the contact person(s) name, phone number and e-mail address.</p>
Requested Effective Date(s):	<p>Enter begin date. By policy the effective date for Equity is the first of the month following the review or in the case of a retention offer the date on which the offer is made.</p>

4. **Copy From Library** (Optional; skip this step if starting from scratch): use this tab to search and copy a position that is already competed **in the Campus Library that is exactly like yours**. When you use this function, all fields from the selected position will be copied from the Position Information tab to your action except for Dept. Name, Working Title, MSP Salary Grade, Immediate Supervisor, and Dept. Initiator with Access. Fill in this data as appropriate.

Copy from Library (tab)

To Copy a Position from the Library:

- Select specific criteria to locate the position or select [Search] to search all.
 - Sort the table by any column header to aid in locating the position.
 - Click "Select and Continue" under the payroll title code to select the position to copy.
- The details of the position copied will be auto populate to your position.

5. **Request Title Code** – (Optional) – Use this feature to select the payroll title that best captures the job. If not sure, leave blank.

Requested Title Code (tab)

To Select a Title Code:

- Select a Payroll Title from the drop down menu or enter a four digit number in Payroll Title Code field and select [Search].
- Select by Clicking "Select and Continue" under the appropriate Payroll Title.
- Select [Continue to Next Page]. The Title Code selected will populate the Requested Payroll Title field in the Position Information Tab and the Title Code details are populated to the Decision Details Tab.

6. **Position Information** – this section collects the position description details and the expectations of the job.

Position Information (tab)	
Dept:	(Displays on Requisition) Select your PPS Home Department from the pull down menu.
Position Number:	Assigned when added by the system upon being submitted to the library. Position number is a unique control number (beginning with 02) and remains with the position throughout its life cycle.
Employee First Name:	The system will auto populate this info at the completion of a "Hire Decision" when an employee is hired into a position. This data field is editable by the Compensation Analyst in "Correct a Position" action. Contact Compensation by email to request a correction to a First Name.
Employee Last Name:	The system will auto populate this info at the completion of a "Hire Decision" when an employee is hired into a position. This data field is editable by the department and department users are expected to make changes to this field on their own.
Employee ID:	The system will auto populate this info at the completion of a "Hire Decision" when an employee is hired into a position. This data field is editable by the department and department users are expected to make corrections to this field on their own.
Position: (Working Title)	<p>(Displays on Requisition) Enter the Position Title that will be advertised on the posted Requisition.</p> <p>Use UPPERCASE lettering. Select a working title that is descriptive but not restrictive and that is meaningful to external applicants. Do not simply repeat the Payroll Title, unless the payroll title itself is descriptive.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> • COMMUNICATIONS AND MARKETING OFFICER • SENIOR PURCHASING ASSISTANT • ACCOUNTING ASSISTANT • CONFERENCE COORDINATOR • COOK <p>If the request is for a short-term hire, begin with STE. <u>Example:</u> STE – ELECTRICIAN</p> <p>If the request is for a PSS or MSP Contract begin with CONTRACT. <u>Example:</u> CONTRACT - ELECTRICIAN</p> <p>If the request is for a Waiver begin with WAIVER. <u>Example:</u> WAIVER – ELECTRICIAN</p>
Requested Payroll Title:	Auto populated based on the payroll title selected in the Requested Title Code tab.
Requested MSP Salary Grade:	<p>If an MSP title (begins with a "0") is requested, select the requested salary grade from the pull down menu (MSP I, II, III, IV, V, VI, VII, VIII, IX, X).</p> <p>If this position is not an MSP title, select "<i>Not Applicable</i>".</p>
Immediate Supervisor	
Supervisor Name:	Enter the Position's Supervisor (First and Last Name).

Supervisor Payroll Title:	Enter the Supervisor's Payroll Title.
Supervisor Phone Number:	Enter the Supervisor's Phone Number.
Department Initiator with Access:	To retain or grant access on an action to an individual whose role is defined in PA as a Dept. Initiator, select the user name(s) from the list. Leave blank for Approver 1 or 2 generating the action.
Position Details	
Job Summary:	(Displays on Requisition) Provide a brief encapsulation of the overall job. Aim for no more than 10-15 lines of text, intended to be a succinct condensation of the overall job. What is provided here is the only description applicants see when a position is advertised as vacant. Begin with the type of Supervision Received. <u>Examples:</u> <ul style="list-style-type: none"> • Under the direction of the Lab Manager... • Under the direct supervision of the Principal Investigator... • Under the general supervision of the Office Manager...
Campus Job Scope: (HR only)	Leave blank; this field is reserved for Career Compass implementation and content is yet to be determined.
Department Specific Job Scope:	Optional field, if unsure leave blank. Enter specific information that describes the context that may impact the position's classification (e.g., quantify, qualify staffing, budget), if applicable.
Positions Supervised: (List payroll title and # of FTE)	A Supervisor is an individual who has the direct responsibility for or effectively recommends on the hiring and evaluation of staff including responsibility involving grievances; determines, distributes, and supervises the work performed and approves leaves and overtime. Has the authority to transfer, suspend, lay off/recall, promote, and reward staff. List the positions which this position directly and/or indirectly supervises. Direct Supervision refers to employees who report directly to this position. Indirect Supervision refers to employees who report to a subordinate supervisor who reports to the position. Then, total number of employees who are both directly and indirectly supervised by this position. <u>Example:</u> Direct Supervision: Administrative Specialist II-Supervisor. – 1.0 FTE Sr. Building Maintenance Worker – 2.5 FTE Laborer - .50 FTE Indirect Supervision: ___Assistant II – 3.0 FTE TOTAL: 7.0 FTE Do not list employees who report to another manager in another unit or department (e.g., TES employees). If the position functions as a "lead", enter N/A. If the position is responsible for directing the work of postdocs or graduate students, enter N/A.

<p>Essential Responsibilities: (Functions)</p>	<p>Provide a function heading in ALL CAPS and describe the essential responsibilities in order of importance; include the % of time for each function heading.</p> <p>Start the description with an action word (i.e., Design, Calculate, Write, Create, Evaluate, Conduct, or Perform). Avoid vague and misleading verbs, such as; Handle, Assist, Help, and Coordinate.</p> <p>Unrelated responsibilities should have separate functions headings. For multiple responsibilities of less than 10% each, however, you may use a "Miscellaneous" or "Other" heading and group these responsibilities together.</p> <p><u>Example:</u></p> <p>55% CONSTRUCTION, RENOVATION AND MAINTENANCE Fabricate, install and repair campus low voltage systems. Communicate to clients' job status, requirements and problems related to repair and installation.</p> <p>20% MATERIALS AND PLANNING Procure materials and restock supplies. Pull plans and blueprints.</p> <p>15% RECORD KEEPING Retain time and accounting of materials and expenses for assigned projects.</p> <p>10% MISC. Keep shop and work area organized and clean. Update shop technical manuals. Participate in safety drills and meetings.</p> <p>If the position supervises a significant number of casual-restricted students, it should be listed as an essential responsibility. Identify the number and total FTE and the duties associated in this field.</p> <p>The total % of all functions should always equal 100%.</p> <p>Do not use words/phrases that describe the speed or quality with which the work is done, as those statements belong in the Job Expectations field.</p> <p><u>Example:</u> Pull new wire accurately. "Accurately" is the expectation of how the work should be done. The function is Pull new wire.</p>
<p>Physical Demands:</p>	<p>(Displays on Requisition) Enter the physical demands of the position (i.e., agility, endurance, strength). Be specific as to what items are lifted, used or maneuvered. Leave blank if there are none. See Appendix 5.1 Americans with Disabilities (ADA) Language for Physical Demands.</p> <p>What are the physical demands that you cannot accommodate? Make sure you are not limiting how the work can be done. Qualify what it is that they need to do.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> -Move and maneuver computer equipment weighing up to 30 pounds. -Lift and stack 40 lb. milk crates. -Climb ladders. -Crawl, bend, stoop and work in tight, confined areas. <p>Note: In a situation where an employee is only asked to occasionally pickup materials or supplies off the floor or out of the back of a truck once a year leave blank. Ask yourself: Are there other staff that could assist with the moving or lifting of something heavy? If so, then it is not an essential Physical Demand and should not be included.</p>

<p>Work Environment:</p>	<p>(Displays on Requisition) Enter environmental factors that influence the work; including conditions of employment (i.e., extreme temperatures, noise, hazards [environmental or chemical], overtime, long hours, travel, background checks, etc.). Do not list “non-smoking environment.” See Appendix 5.2 for a complete list of standard statements used in Work Environment/Conditions of Employment.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> -Work flexible schedule. -Work overtime including evenings, weekends and/or holidays to meet business needs. -Restricted vacation (i.e., during fiscal closing [or any other peak work period]). -Position may, at times, require employee to work with or be in areas where hazardous materials and/or infectious diseases are present. -Background Check [insert full statement] = This position is a critical position and subject to a background check. Employment is contingent upon successful completion of background investigation including criminal history and identity check. -Medical Surveillance [insert full statement] = Employee shall participate in required preventative medical and medical monitoring programs which may include blood tests, immunizations, TB screening, Blood borne and Airborne Pathogen training, etc., and are provided to meet Federal, State and University requirements. -Drug and Alcohol Testing Program [insert full statement] = Position will participate in the Department of Motor Vehicles (DMV) Pull Notice System. Employment contingent upon successful completion of the Department of Transportation (DOT) Drug and Alcohol Testing program; employee will be placed on the random testing pool list for drug and alcohol testing.
<p>*Background Check Required: <i>This position is a critical position and subject to a background check. Employment is contingent upon successful completion of background investigation including criminal history and identity checks.</i></p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Qualifications</p>	
<p>*Minimum Qualifications:</p>	<p>(Displays on Requisition) Minimum qualifications describe the minimum skills, knowledge, experience, or credentials (if validated for the position) required by all applicants to be considered in the applicant pool. Include licenses required by law to perform specific duties, e.g., Licensed Surveyor, Registered Professional Engineer, or valid Class B California driver's license to operate heavy commercial trucks.</p> <p>Describe the minimum experience, knowledge, skills, abilities or credentials required on day one of the job. List in order of importance. Do not include adjectives or modifiers, such as: Demonstrated, Excellent, Strong, Superior, Accurately, Rapidly, etc.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> -Experience fabricating, maintaining, servicing, repairing, replacing, installing and/or altering electrical work. -Knowledge of material handling equipment, techniques and safety practices. -Accounting skills to reconcile ledgers, produce budgets, and review financial reports.

	<ul style="list-style-type: none"> -Knowledge of the principles and practices of watershed management and wildlife fisheries biology. -Master's degree in Veterinary Medicine. -Registered Veterinary Technician certificate. -Pesticide Applicators License. <p>DEFINITIONS of KNOWLEDGE, SKILL, ABILITY (used both for Minimum Qualifications, and Preferred Qualifications):</p> <p>Knowledge – A body of information (conceptual, factual, or procedural) that can be applied directly to the performance of tasks.</p> <p>Skill – An acquired proficiency, or observable competence for working with or applying knowledge to perform a particular task or a closely related set of tasks.</p> <p>Ability - An underlying, enduring trait of the person that is useful for performing a range of different tasks; natural talents or innate capabilities.</p> <p>Knowledge, skills and abilities can be expressed in terms of <i>practices/methods/procedures</i>, relating to how something is done, rather than why it works. E.g. "Skill in mixing standard laboratory reagents", and "knowledge of instrument calibration techniques" are procedural.</p> <p>Or, they can also be described in terms of <i>principles or theories</i>, representing a more advanced body of knowledge, typically acquired through college or graduate level education, or very extensive experience. Principles relate to an understanding of the accepted tenets of a field, involving a higher level of knowledge or cognitive processing than procedures. E.g. "Knowledge of the principles of inorganic chemistry".</p>
<p>Preferred Qualifications:</p>	<p>(Displays on Requisition) Preferred qualifications are the secondary selection criteria used during recruitment to determine the most qualified applicant(s).</p> <p>List here the additional experience, knowledge, skills or abilities which are not absolutely necessary to begin work on day one, or which can be acquired after the employee starts on the job. Leave out qualifications which can be learned in a brief on-the-job orientation period.</p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> -DaFIS, PPS, PPS DS, Banner experience. -Ability to learn Excel and PowerPoint. -Knowledge of current building codes for the installation of plumbing systems.
<p>Job Expectations:</p>	<p>All PD's must contain: "Read and follow the UCD Principles of Community."</p> <p>Except for the above, completion of this section is optional. If used, do not list or repeat skills, knowledge, abilities, or experience.</p> <p>The language contained in this section should be expectations that define the performance measurements by which the employee will be evaluated. If you need assistance with this section, please contact your E&LR Consultant for advice and counsel.</p> <p>This section prints separately from the position description. The printable report contains a signature block and may be used for new employee orientation.</p>

7. **Decision Details** (No action required) - This section will be completed by Compensation following their review.

8. **Attach Documents** – This feature allows the department to attach an organization chart and other documentation such as a copy of an old position description, etc. Please include an organization chart with reclassification requests.

Attach Documents (tab)

To Attach Documents:

- Select the “Attach” link under Attach/Remove.
- Under “Upload a New Document”, select [Browse] to locate the file on your desktop or network.
- Select [Open] to attach the file. The document will fill the “File” box.
- Select [Attach] to attach the document.
- Select [Confirm] to finish attaching the document. This may take a few minutes as the system converts the file to PDF and attaches it to your action. The attached document will show as a link under View Document.

Note: This functionality does not work on the training site.

9. **Notes** (Optional) – The notes tab allows departments to provide **additional** information to departmental approver or Compensation Analyst (i.e., information not provided anywhere else on the form).

Notes: (tab)

Enter notes for inter-departmental communication or to communication additional information to HR.

10. **History** (No action required) – This function will track each and every user that has handled an action at every point in the review process; taking a snap shot of the position as it moves from user to user. This will occur automatically by the system

- Click the “View Summary” link to view the position form as completed by a previous user.

11. To **Submit to an Approver or HR**

- Click [Preview Action] at the bottom of the screen.
- Select the appropriate “Action Status” for the next Approver or Submit to Comp, click [Continue], then click [Confirm].

The system will indicate the position was submitted to the Status selected.

Note:

- After Compensation Reviews the position action, a decision will be made and communicated and then the position will be updated in the library and the position action will be added to the Position History.
- Email notifications will be triggered throughout the process to notify you of the status of the action.

4.2 Create a new Position and Submit an Action

Note:

- All employees with an active career appointment in PPS prior to 10/27/08 were preloaded into the department library and assigned a position number. Employees hired between 10/27/08 – 12/15/08 will not have a PeopleAdmin record or position number assigned. Follow these steps to create a record for individuals that fall into this category.
- It is very important that users pay full attention to the details at this point of the process because after a position description is approved and submitted to the Library, the contents that pull forward into requisition cannot be altered when in requisition mode. If edits are required when in requisition mode, follow the steps outlined in Section 4.1.

Steps to create a new position or to create a position for employees that do not have a PeopleAdmin record in your Department.

STEPS

1. From the menu located on the left side of your screen, under POSITION MANAGEMENT, click “Begin New Action”. Click “Start Action” under **New Position**.

Follow Steps 3 - 11 from Section 4.1

4.3 Save an Incomplete Action and Return to Modify/Submit

Note: To save a position action in progress make sure an Action Type in the Justification tab and a Dept. in the Position Information tab are selected. These two fields are required fields: users will not be permitted to move to the next page or tab if they are not selected.

STEPS TO SAVE AN ACTION IN PROGRESS

1. In the Justification tab, select an Action Type.
2. In the Position Information tab, select a "Dept". If your dept. has multiple users initiating and submitting actions, make a note in the "Essential Responsibilities" or "Minimum Qualifications" that the action is not complete by typing "Incomplete" to alert others and as a reminder to finish these data fields when you return.
3. Click [Preview Action] at the bottom of the screen. Select the "Save Action Without Submitting", click [Continue], and then click [Confirm]. The system will flag the action with the Status of Action Saved Not Submitted.

STEPS TO RETRIEVE AN ACTION

1. Select "**Pending Approval**" from the Position Management Menu.
2. Click "View" under the Action Type of the position to review.
3. Click "Edit" above Action Status.
4. Click the Tabs at the top or [Continue to Next Page] to navigate the position action.
5. After reviewing/editing the action, select [View Action Summary] at the bottom of the screen to submit the action to the next approver, return to a previous user or submit to compensation for review. Click [Confirm] and click [Continue].
6. A notification that the action was moved to the status selected will appear.

4.4 Send a Copy of a Position for External Review

Note: A user may send an electronic copy of a position action or position description for external review. This can be achieved by copying and pasting the action/position description into MS Word or other application.

STEPS TO COPY A POSITION ACTION FOR EXTERNAL REVIEW:

Not Saved or Submitted

1. After completing the position action, click [View Action Summary].
2. Click "Printer Friendly Version" to the right of the screen. A printer friendly Position Summary opens in a second window.
3. To Copy the Position Summary, position the cursor before Justification at the top of the summary then left click and hold while dragging down the screen until you reach the end of the document.
4. Select "Edit" on the Position Summary menu bar and select "Copy". Click the "X" to close the window.
5. Open MS Word, select "Edit" on the MS Word menu bar, and select "Paste".
6. Save the document and send it via email.

Saved

1. Select "**Pending Approval**" in the Position Management Menu.
2. Click "View" under the Action Type of the position.
3. Follow steps 2 - 6 in Not Saved or Submitted above.

Submitted

1. Select "**Search Actions**" in the Position Management Menu.
2. Use the search criteria to locate the position or choose [Search] to view all position actions.
3. Use the arrows located to the left of the column headers to sort the table alpha or reverse alpha.
4. Click "View" under the Action Type of the position.
5. Follow steps 2 - 6 in Not Saved or Submitted above.

STEPS TO COPY A POSITION DESCRIPTION FOR EXTERNAL REVIEW:

From the Department Library

1. Select "**Department Library**" in the Position Management Menu.
2. Use the search criteria to locate the position or choose [Search] to view all positions.
3. Use the arrows located to the left of the column headers to sort the table alpha or reverse alpha.
4. Click "View Summary", to view the position description with the current employee.
5. To Copy the Position Summary, position the cursor before "Employee Details" at the top of the summary then left click and hold while dragging down the screen until you reach the end of the document.
6. Select "Edit" on the Position Summary menu bar and select "Copy". Click the "X" to close the window.
7. Open MS Word, select "Edit" on the MS Word menu bar, and select "Paste".
8. Save the document and send it via email.

Note: Use the same instructions to send Expectations to an External User. At step 4, select "Get Reports List", click [Generate Report], and select "Expectations". Then follow steps 5 – 8.

From the Campus Library

1. Select "**Campus Library**" in the Position Management Menu.
2. Use the search criteria to locate the position or choose [Search] to view all positions.
3. Use the arrows located to the right of the column headers to sort the table alpha or reverse alpha.
4. Click "Get Reports", click [Generate Report], and select "Position Description".
5. To Copy the Position Description, position the cursor before "Position Description" at the top of the summary then left click and hold while dragging down the screen until you reach the end of the document.
6. Select "Edit" on the Position Summary menu bar and select "Copy". Click the "X" to close the window.
7. Open MS Word, select "Edit" on the MS Word menu bar, and select "Paste".
8. Save the document and send it via email.

Note: Use the same instructions to send Expectations to an External User. At step 4, select Get "Reports List", click [Generate Report], and select "Expectations". Then follow steps 5 – 8

4.5 View Actions Awaiting your Review/Approval

Approver 1 and 2 will receive an email notification, alerting them that a position is awaiting their review/approval.

STEPS TO REVIEW, EDIT AND/OR APPROVE A POSITION ACTION

1. Log-in to PeopleAdmin and select "**Pending Approval**" from the Position Management Menu.
2. Click "View" under the Action Type of the position to review.
3. Click "Edit" above Action Status.
4. Click the Tabs at the top or [Continue to Next Page] to navigate the position action.
5. After reviewing/editing the action, select [View Action Summary] at the bottom of the screen to submit the action to the next approver, return to a previous user or submit to compensation for review. Click [Confirm] and click [Continue].
6. A notification that the action was moved to the status selected will appear.
7. To view this action after you have submitted it, select Search Actions to view all active actions in progress.

4.6 View Department Position Actions in Progress

Approver 1 and 2 can view all position actions in progress. Department Initiator can only view only position action by designation.

STEPS TO VIEW DEPARTMENT ACTIONS

1. Select "**Search Actions**" in the Position Management Menu.
2. Use the search criteria to locate the position or choose [Search] to view all positions in the Department library.
3. This screen will display all actions in progress and indicate where the action is in the process (i.e. Submitted to Dept Approver 2). Use the arrows located to the right of the column headers to sort the table alpha or reverse alpha.
4. Click "View" under the Action Type of the position.
5. Scroll down the page to view the action.

6. Click [Cancel] to return to the table of position actions.

4.7 View a Department Historical Actions

Approver 1 and 2 can view all historical actions. Department Initiator can view only historical actions in which they were originally designated access.

STEPS to VIEW DEPARTMENTAL HISTORICAL ACTIONS

1. Select "**Historical**" in the Position Management Menu.
2. Use the search criteria to locate the position or choose [Search] to view all positions in the Department library.
3. This screen will display all historical actions and indicate a final status such as: Submitted to Library – Review, Submitted to Library – Stipend, Submitted to Library – Corrected, etc. Note: Over time, there will be many historical actions for a single position number. Date approved and the action number identifies more recent actions for a position.
4. Arrows located to the left of the column headers sort the table alpha or reverse alpha.
5. Click "View" under the Action Type of the position to view the action.
6. Scroll down the page to view the action.
7. Click [Cancel] to return to the table of position actions.

4.8 View/Print a Department Position Description and/or Expectations

All users can view/print positions descriptions in the Department Library which include Position History, Position Description with Employee, Position Description only, and Position Expectations.

STEPS TO VIEW/PRINT A DEPARTMENT POSITION DESCRIPTION AND/OR JOB EXPECTATIONS

1. Select "**Department Library**" in the Position Management Menu.
2. Use the search criteria to locate the position or choose [Search] to view all positions in the Department library or enter a last name or other criteria. By selecting [Search], all position descriptions in the department(s) for which you have access will be displayed. Use the arrows located to the left of the column headers to sort the table alpha or reverse alpha.
3. Click "View Summary" under the Payroll Title to access the **Position Description with the Employee Name**. To print, select "Print" on the menu bar to print the Position Description. Click the "X" in the upper right corner of the window to close the Summary.
4. Click "Get Reports List", click the radio button **Position Description** for just the position description, and click [Generate]. To print, select "Print" on the menu bar to print the Position Description. Click the "X" in the upper right corner of the window to close the Report.
5. Remain in "Get Reports List", click the radio button **Expectations Report**, and click [Generate]. To print, select "Print" on the menu bar to print the Position Description. Click the "X" in the upper right corner of the window to close the Report.
6. Click "Return to Previous" to return to the Department Library.

4.9 View/Print a Campus Position Description and/or Expectations

All users can view/print positions from the Campus Library; these reports do not include names of individuals in the job or on the Expectations.

STEPS TO VIEW/PRINT A CAMPUS LIBRARY DESCRIPTION AND/OR EXPECTATIONS REPORT

1. Select "**Campus Library**" in the Position Management Menu.
2. Use the search criteria to locate the position or choose [Search] to view all positions in the Department library. By selecting [Search], all position descriptions in the department(s) for which you have access will be displayed. Use the arrows located to the left of the column headers to sort the table alpha or reverse alpha.
3. Click "Get Reports List", click the radio button **Position Description** for just the position description, and click [Generate]. To print, select "Print" on the menu bar to print the Position Description. Click the "X" in the upper right corner of the window to close the Report.
4. Remain in "Get Reports List", click the radio button **Expectations Report**, and click [Generate]. To print the Position Description, select "Print" on the menu bar. Click the "X" in the upper right corner of the window to close the Report.

5. Click "Return to Previous" to return to the Campus Library.

4.10 Update Employee and Supervisor Information

(Use this only if a position has been completed, reviewed, and submitted to the Campus Library by Compensation.)

STEPS TO UPDATE EMPLOYEE LAST NAME, DEPARTMENT OR SUPERVISOR

1. From menu located on the left side of your screen, under POSITION MANAGEMENT, click "Begin New Action".
2. Click "Start Action" under **Update Employee and Supervisor Information**
3. Use the search criteria to locate the position or choose [Search] to view all positions in the Department library.
4. Select "Start Action" below the Payroll Title.
5. Update the necessary fields and select [Continue to Next Page] or [Preview Action] at the bottom of the screen.
6. Select the appropriate Action Status based on your Department protocol (i.e. Update Information, Submit to Approver, etc). Click [Continue] and click [Confirm] to submit the action to the library and submit it forward for approval. Note: the status "Updated Information" will update the position in the library and the position history. The system will add this action to Historical position actions.

STEPS TO CORRECT A SPELLING ERROR, EMPLOYEE FIRST NAME OR ID NUMBER ON A POSITION

To correct a spelling error or a first name on a position, email pahelp@ucdavis.edu. Include the following information:

- Position or Action number
- Data field and Correction
- Your First and Last Name, Phone Number and Department

You will be notified by the help desk when the change is completed.

4.11 Vacate a Position in the Library

When an employee tenders their resignation or when a Short Term Employment or PSS Contract appointment ends, this action will remove the incumbent's name from the record and flag the position as vacant.

STEPS TO VACATE A POSITION IN THE LIBRARY

1. From menu located on the left side of your screen, under POSITION MANAGEMENT, click "Begin New Action".
2. Under **Vacate Position**, Click "Start Action"
3. Enter search criteria to locate the position or choose [Search] to view all positions in the Department library.
4. Select "Start Action" below the Payroll Title.
5. Skip the Position tab and click "Vacate Employee".
6. Click "Open Position" if you intend to refill or click "Provision Eliminated" if you do not intend to refill in the near future.
7. Click the "Notes" tab or [Continue to Next Page] to add notes. The notes tab is optional. Click [Preview Action] at the bottom of the screen, select the status "Update Library – Position Vacated", click [Continue], and click [Confirm]. The position will be updated in the library and the position history. The system will add this action to Historical position actions.

SECTION 5: APPENDICES

5.1 Physical Demands: Americans with Disabilities (ADA) Language

The following are ADA compliant verbs to be used to describe the physical demands of a position:

1. Strength Moves/transport

Puts
Installs/takes out
Removes/replaces
Positions/places/transfers

2. Climbing or balancing Ascends/descends

Works atop
Traverses

3. Walking/running/stooping

Kneeling, crouching and/or crawling
Moves (about or to)
Traverses
Positions self (to)

4. Reaching/handling/fingering and/or feeling

Detects
Installs/places
Removes/replaces
Operates
Adjusts
Attaches
Handles/tends
Activates, feeds or controls
Applies
Uses
Modifies
Inputs
Drafts/writes

Compiles/retrieves
Makes/constructs
Creates/fabricates
Collects
Inspects
Prepares
Serves/services

5. Talking and/or hearing Communicates

Detects
Converses with
Discerns
Conveys
Expresses oneself
Discusses
Exchanges information

6. Seeing Detects

Determines
Distinguishes
Identifies
Recognizes
Perceives
Estimates
Discerns
Inspects
Compares
Observes
Assesses

5.2 Work Environment: Statements

The following statements must be used to describe conditions of employment and/or the work environment, if applicable. If applicable, enter these statements (in their entirety) in the Work Environment text Box of the Position Information tab.

Background Check: <https://jobs.hr.ucdavis.edu/jm/help/backCheck.html> This position is a critical position and subject to a background check. Employment is contingent upon successful completion of background investigation including criminal history and identity check.

BioSafety Level (BSL) 1, 2, or 3 Facilities: Must be willing to perform assigned duties in BioSafety Level (BSL) 1, 2, or 3 facilities where nonhuman primates may be either naturally or experimentally infected with potentially hazardous diseases such as HIV, SIV, or Herpes B virus.

Conflict of Interest-Designated Official: <http://manuals.ucdavis.edu/spp/spp82.htm> . Under the provisions of the Political Reform Act of 1974, the successful candidate will be required to file a Statement of Economic Interests.

DMV Record Required: A copy of DMV record will be required as a final condition of employment.

DMV Pull Notice System: Position will participate in the Department of Motor Vehicles (DMV) Pull Notice System. Employment contingent upon successful completion of the Department of Transportation (DOT) Drug and Alcohol Testing program; employee will be placed on the random testing pool list for drug and alcohol testing.

DOT Drug and Alcohol Testing Program: <http://manuals.ucdavis.edu/ppm/380/380-22.htm> Employment contingent upon successful completion of the Department of Transportation (DOT) Drug and Alcohol Testing Program; employee will be placed on the random testing pool list for drug and alcohol testing.

Elder Abuse Reporting Statement: Position requires signing a statement of understanding of Dependent Adult/Elder Abuse Reporting Requirement Confidentiality Statement.

Employee Responsible for Health and Safety: Employee is personally responsible for following health and safety guidelines/instructions.

Hazardous Materials/Infectious diseases present: Position may, at times, require employee to work with or be in areas where hazardous materials and/or infectious diseases are present.

Measles Vaccination/Proof of illness: Measles vaccination or proof of illness required.

Medical Surveillance: This position is subject to Medical Surveillance procedures and review in accordance with Federal and State Laws and Regulations and University Policy.

Overnight Travel: Overnight Travel required.

Police Officers Medical and Psychological Exam: Candidate must pass comprehensive medical and psychological examinations as established by the University and by State law for Police Officers.

Pre-Placement Medical Exam: This position is subject to completion of a Pre-Placement Medical Exam provided by Employee Health Services.

Preventative Medical and Medical Monitoring: Employee shall participate in required preventative medical and medical monitoring programs which may include blood tests, immunizations, TB screening, Blood borne and Airborne Pathogen training, etc., and are provided to meet Federal, State and University requirements.

Protective Clothing and Respirator: Required to wear protective clothing and respirator in circumstances that require personal protection from infectious disease.

Restricted Vacation During Peak Periods: Restricted vacation during peak periods.

Sick Animals, Hazmat, Diseases, Distraught Animal: May require working with or around areas with sick animals, hazardous materials, and/or infectious diseases, and distraught clients.

Valid CA Driver's License Required: Valid CA driver's license required OR Valid Class A driver's license required.

Work Schedule:

Be available to work On-Call.

Schedule is subject to change with only 12-24 hours notification.

Vacation is restricted during peak workload periods.

Work irregular shifts, including weekends, holidays, and evenings.

Work flexible schedule.

Work occasional evenings and/or nights.

Work occasional varied lunch hours.

Work overtime, occasional weekends on short notice.