

Request for Position Review Steps:

Tuesday, March 08, 2016 1:22 PM

If the business needs of the work unit has changed and those changes result in a redesign of a position or positions within your work unit, here is the process to achieve that goal:

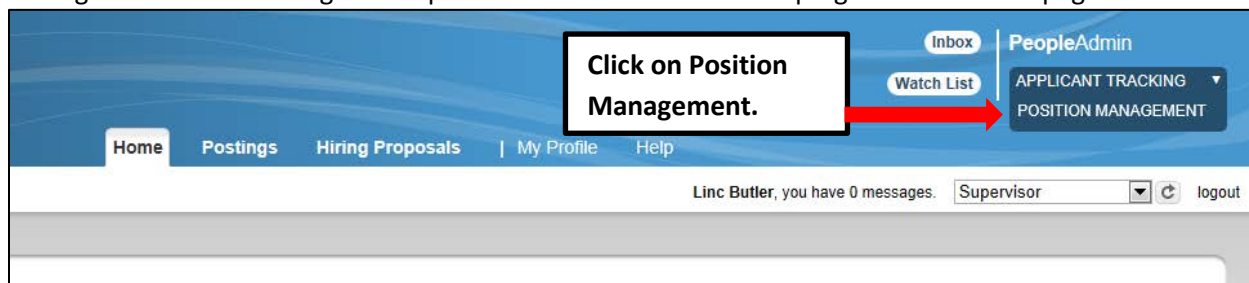
- A reallocation to a different career band or level will require a new job description:
 - There must be significant job change to warrant a career band change
 - The salary cannot exceed market reference rate
 - Changes to reallocate a position should be based on business needs, not acquired skills of the employee:
 - If the employee has received additional training, education, or acquired a new skill set(s), ask is it relevant to the business needs of the department.
1. Complete a modify position description in People Admin and provide job specifics. *Competency level of the position must match available funding and justifiable business need.
 2. Once the request has been received in Human Resources, the consultant has 30 days to conduct an analysis of the request. The supervisor will receive notice from the consultant stating the results of the request.

Preperation Steps to make data entry to People Admin easier

1. Summarize changes you are making to the job. This requires more explanation than "job has changed and taken on more duties."
2. Type in specific job duties related performed by the position. Indicate duties that are new to the position. *You may copy these from the former job description and then expand on them, if some of the duties remain the same.*
3. Indicate priority order and indicate frequency of the task.
4. Attach supporting document from list.

Modify Position Description – SPA

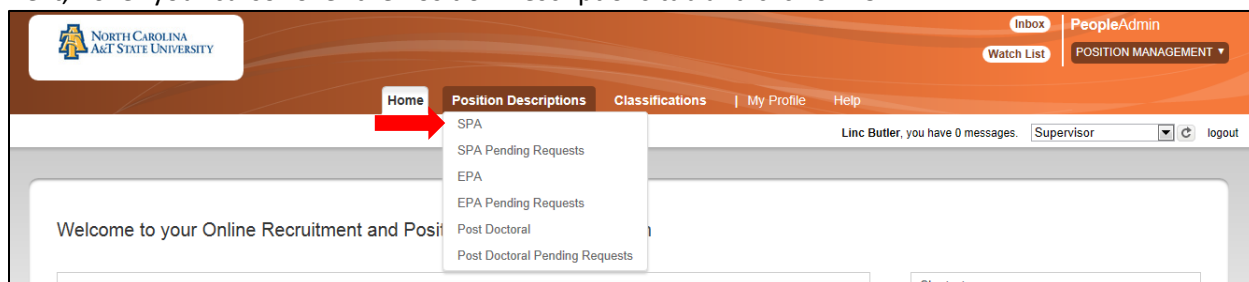
To initiate a Modify Position Description request for an SPA position, first switch to the Position Management module using the drop down menu located in the top right corner of the page:



Once in the Position Management module, make sure you have the necessary active user type. Remember: only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a Modify Position Description request:



Next, hover your cursor over the Position Descriptions tab and click on "SPA":



You will then be taken to the Position Descriptions view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head	All positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	All positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

In the Position Descriptions view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches for use again later.

The screenshot shows the SPA Position Descriptions interface. A red arrow points to the 'Supervisor' dropdown menu, with a callout box stating 'Active user type is Supervisor.' Another red arrow points to the 'More search options' link, with a callout box stating 'Searches are customizable by position attributes and can be saved for later use.' A third red arrow points to the 'Saved Search: "All Position Descriptions" (104 Items Found)' section, with a callout box stating 'List of position descriptions by active user type.'

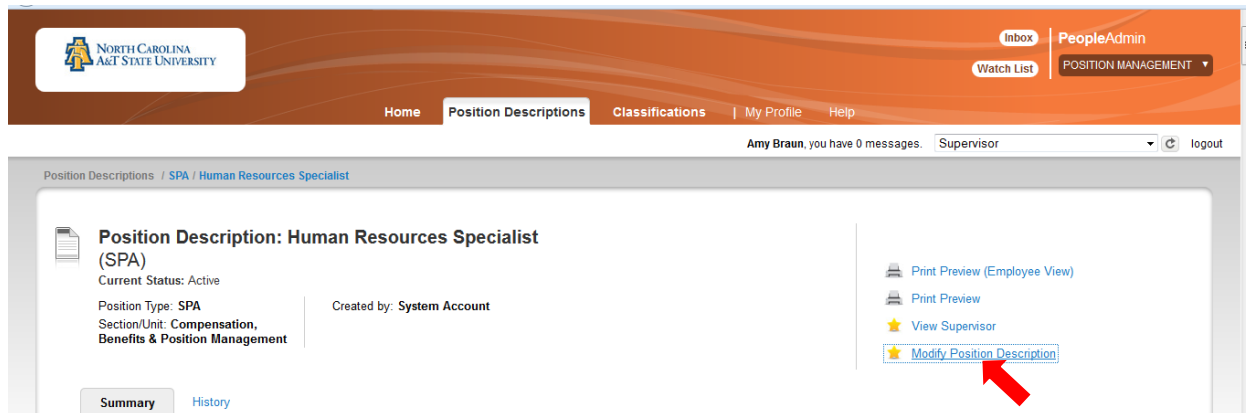
Working Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
Staffing Services Manager	000016	Tamara	Hill	Human Resources Manager (Linc Butler)	Active	Actions
Administrative Support Spec	000016	Belinda	Macklin	Human Resources Manager (Linc Butler)	Active	Actions
Human Resources Specialist	010000	Ester	Jones	Human Resources Specialist (Amy Braun)	Active	Actions
Human Resources Manager	000027	Linc	Butler	Human Resources Specialist (Amy Braun)	Active	Actions
Administrative Support Assoc	000037	Rozelene	Fairstar	Business Officer (Jacob Teagle)	Active	Actions
Recruitment Coordinator	000040	Lorrie	Crofts	Human Resources Manager (Linc Butler)	Active	Actions
Administrative Support Spec	000045	Shelby	Clark-Fuller	Human Resources Specialist (Amy Braun)	Active	Actions

To initiate the request, select the position number you are modifying by clicking on the Working Position Title of the position.

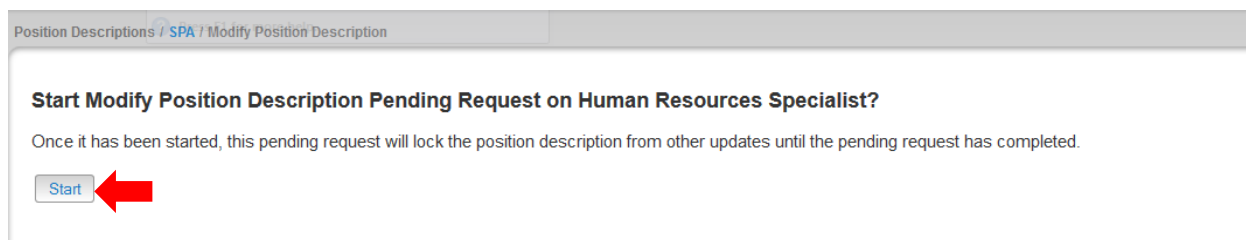
The screenshot shows the SPA Position Descriptions interface. A red circle highlights the text 'to modify an existing position,' in the instructions section. A red arrow points to the 'Human Resources Specialist' position in the table, which is highlighted in yellow.

Working Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
Human Resources Specialist	010000	SPA	User1	Human Resources Specialist (Amy Braun)	Active	Actions
Administrative Support Spec	000045	Shelby	Clark-Fuller	Human Resources Specialist (Amy Braun)	Active	Actions
Human Resources Specialist	000046	Amy	Braun	Human Resources Manager (Linc Butler)	Active	Actions
Position Management Assistant	001111			Human Resources Specialist (Amy Braun)	Active	Actions
Compensation and Benefits Specialist	1234			Human Resources Specialist (Amy Braun)	Active	Actions

When the position description loads, click on “**Modify Position Description**” in the menu to the right.



You will then be asked to confirm that you are ready to begin working on modifying this position description. The confirmation is important because once you begin work on this position number to revise the description, no other action can be initiated until all required fields are completed and the revised position description is **approved**.



Edit Pending Request Page - General Navigation

After clicking on the “**Start**” button, you will then be taken into the **Position Action Justification tab**, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the orange “**Next>>**” button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the “**Save**” button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a Blue Check Circle will appear beside the tab. The Blue Check Circle also appears next to tabs that do not contain any required fields. (In this example, because the position had been previously approved, the required fields have been completed. It is important to remember to make the necessary revisions to all key fields in a modification action because in many cases, you will not receive “prompts” to update when a field is populated already).

Home | Position Descriptions | Classifications | My Profile | Help

Amy Braun, you have 0 messages. Supervisor [dropdown] Logout

Pending Requests / ... / Modify Position Description / Class & Comp Specialist / Edit

Editing Pending Request

Position Action Justification [Save] [Next>>]

☒ Check spelling

* Required Information

Position Action Justification

Select the requested position action. If a reclassification, level change, or salary increase is requested, explain the factors influencing the request for review. The proposed effective date must be a future date, subject to change for payroll entry. The requested salary, if entered, must reflect a budgeted amount to be identified with a funding source and is subject to DHR and budget review and approval available.

Reason for Position Modification

- ☒ Add Position Details for Posting
- ☒ Reclassification Review for Career Band Change
- ☐ Position Competency Level Review Change
- ☐ Career Progression Increase Review
- ☐ FTE Change
- ☐ Funding Source Change
- ☐ Change Reporting Relationship (Supervisor or Organization)
- ☐ Abolish Position
- ☐ Other - Explanation Required

Adding details in the “**Explanation of Required Change**” field (illustrated below) will expedite your request by helping other approvers and Human Resources reviewers understand the context for your request.

Remember that the funding source for a budgeted change in the position salary **must be identified** if you request an increase. Funding source details are entered on a later tab. As noted, any increase amount is subject to review and approval by the Division of Human Resources.

If you are requesting a reclassification, please enter the current classification in the designated field. Follow any other instructions; then click the orange “**Next>>**” button (located at both top and bottom right corners) to save changes and navigate to the next tab:

Explanation of Requested Change

The duties of this position have substantially changed as a result of reorganization. Preparing for recruitment.

Current Career Band/Classification

If requesting a reclassification review for a career band change, please enter current career band

Proposed Effective Date 09/02/2013

Requested Salary 40000

If applicable, % increase requested

Position Request Number

[Save] [Next>>]

SPA Classification Tab

If you are not requesting a different career band, click on the **Next>>** button located in the orange box at the top right-hand corner of the page.

If you are requesting a different classification (career band), **scroll down below** the **Selected Classification** details and use **“Filter these results”** to search all position/classification (career band) titles by a key word. Your Class/Comp analyst in DHR can assist you in choosing a career band with related competencies most closely matching the revised business needs being met by the position.

To view a different classification summary, Click on the arrow by “Actions” to the right of any title and select **View Classification**. To return from the summary, use the **Back** button located on the top left corner of your web browser. To **select** a different proposed classification and proceed with modifying the position, click on the **Radio Button** to the left of the title you want to select, and then click on the **Next>>** button located on both the top and bottom right-hand corners of the page.

Clicking on the “Position/Classification Title” will open the “View Classification” page in a new tab within our web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **SPA Classification tab** and your request in progress. **PLEASE NOTE:** Clicking on the red “X” on the top right corner of your web browser will close the web browser and **log you out** of the system.

You can navigate to the previous tab by clicking on the grey **<<Prev**” button located between to the Save and Next buttons on the top right-hand corner of the page:

The screenshot shows the 'SPA Classification' page in a web browser. At the top, there is a navigation bar with tabs: Home, Position Descriptions, **Classifications**, and My Profile. Below this, a breadcrumb trail reads: Pending Requests / ... / Modify Position Description / Class & Comp Specialist / Edit. The main content area is titled 'SPA Classification' and contains three paragraphs of instructional text. At the top right of this section are buttons for 'Save', '<< Prev', and 'Next >>'. A red arrow points from a callout box to the '<< Prev' button. On the left side, there is a sidebar titled 'Editing Pending Request' with a list of links: Position Action Justif..., **SPA Classification**, SPA Position Details, Position Funding Infor..., Add ADA Checklist Form, Supplemental Documenta..., Supervisor, Employee, and Pending Request Summary. A red arrow points from a callout box to the 'SPA Classification' link. Below the instructional text, there is a section titled 'Selected Classification' which lists 'SPA Classification Details' and 'SPA Classification Information'. A red arrow points from a callout box to this section. At the bottom, there is a form with a label 'Position/Classification Title' and the text 'Human Resources Specialist'.

Navigate to the previous tab by clicking on the “<<Prev” button.

Scroll Down below the Selected SPA Classification Details to view or select other career band summaries.

This section summarizes the current classification’s Description of Work, Competencies, Salary reference points for each level, and Minimum Requirements.

Competencies from Classification

Competencies are knowledge, skills, and abilities that are required in the position to meet business needs. A specific group of competencies is identified for each position and are demonstrated on the job and are utilized in the development of a position.

Use only the competencies listed here.

Using only those competencies listed below, describe the major job duties of the position related to at least three of the competencies required in the selected career band.

Competencies

Verbal Communication, Written Communication, Office Technology, Work Coordination, Problem Solving, Program Knowledge, Information/Records Administration, Budgeting

Competency Profile
[link to OSP]

<http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/Admin%20Support%20Associate%20profile.pdf>

Competencies and Related Job Duties

To enter the job duties, please click the "Add Competencies and Related Job Duties Entry" button. Repeat for each competency area. You will need to **scroll back down to this section** with each addition to enter a competency. The total percentage of time allocated for all the tasks and responsibilities must equal 100%.

Click here to add competencies and related job duties - 3 entries are required.

Unless job duties are described in three competency areas, the system will prevent submission of the entry.

[Add Competencies and Related Job Duties Entry](#)

Competency	Verbal Communication	Select competency from the drop down list.
Describe the specific job duties related to this competency	Greets visitors to office and refers them to appropriate personnel. Answers and routes calls to appropriate personnel. Provides information to callers and visitors on basic office policies and procedures.....	Describe specific job duties related to competency.
Percentage Of Time	15%	Indicate percentage of time spent performing duties described.
☐ Remove Entry?		
Add Competencies and Related Job Duties Entry		Click to add additional competency area and job duty details (minimum of 3 from competencies from classification required).

Position Details – Compliance and Requirements

Completing the final position details fields identifies all required and preferred qualifications.

Supervisory		Select Yes or No from drop down list.
Does this position supervise?	Please select This field is required.	
HELP TEXT: Supervisory positions conduct interviews, make final hiring decisions, provide salary recommendations, monitor and assign work, counsel and discipline employees under direct supervision, develop work plans and conduct performance appraisals for PERMANENT employees. If this position performs ALL of the ABOVE supervisory responsibilities, please indicate the following:		
Percent of Time Spent		If Yes, then complete these fields.
Number of Permanent Employees this Position Supervises		
Athletics		
Is this position assigned to the department of Athletics or involved or associated with athletics, including but not limited to, responsibility for admission, certification of academic standing, evaluation of academic performance and administration of financial aid for student athletes?	Please select This field is required.	Question is required to ensure NCAA compliance.

Requirements and Preferences

- Is this position considered an essential position? Please select ▼ This field is required.
- Minimum Experience/Education: Bachelor's degree; or an equivalent combination of training and experience. All degrees must be received from appropriately accredited institutions.
- Preferred Years Experience, Skills, Training, Education
- Required License or Certification
- Valid NC Driver's License required? Please select ▼ This field is required.
- Commercial Driver's License Required? Please select ▼ This field is required.
- Physical Required? Please select ▼ This field is required.
- List any other medical/drug tests required

Information from this section is used to populate the job posting when it is time to recruit.

Complete this page by clicking on [Save](#) and [Next>>](#)

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

Position Funding Information Tab

In the **Funding Source Details** section of this tab, you will confirm existing or enter new fund sources to support the request. If you are modifying a position to change the funding source, you will need to type over any existing fund, account, program and org codes to replace the numbers with new codes. Click on the **Add Funding Source Details Entry** button to enter budget and other required codes. Select "Save" after each entry. PLEASE NOTE: The annual amount budgeted must equal the requested salary.

This section functions like the "Competencies and Related Job Duties" section in that each time you click to add another entry, you are taken up to the top of the funding information page. If you are revising or adding more than one funding source, you will need to scroll down below the first entry to revise or enter the second. If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and "Save" until all sources have been entered. Once all funding sources have been added, click "Next>>" to move to the next tab:

Home **Position Descriptions** **Classifications** **My Profile** **Help**

Linc Butler, you have 0 messages. Supervisor logout

Pending Requests / ... / New Position Description / / Edit

Editing Pending Request

- Position Action Justif...
- SPA Classification
- SPA Position Details
- Position Funding Infor...**
- Add ADA Checklist Form
- Supplemental Documents
- Supervisor
- Pending Request Summary

Position Funding

*** Required Information**

Funding Source Details

Indicate the funding source(s) for this position. Select "SAVE" after each entry. Please note...

If the position has more than one funding source entered. Each time you add an additional funding source. Click on Add Funding Source Details Entry.

IMPORTANT NOTE: Remember to click "Save" after each funding source is entered.

Click here to add a funding source. If the position has more than one funding source, continue to click here until all funding sources are entered.

[Add Funding Source Details Entry](#)

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

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

The screenshot shows a form titled "Add Funding Source Details Entry". The form contains several fields and checkboxes. Red arrows point from callout boxes to specific fields:

- Callout 1:** "Select State or Non-State from drop down list." points to the "State Appropriated Funding / Non-State Appropriated Funding" dropdown.
- Callout 2:** "If Non-State, select funding source from drop down list." points to the "If non-state, select source of funding" dropdown.
- Callout 3:** "Enter or Revise funding source information. If you are not sure about fund/account/org numbers assigned to your department or the amount/type of funding available, refer to the Chart of Accounts or contact Budget and Planning. Submissions with incorrect information here will be returned to you and cause delays in reviewing and approving your request." points to the "Fund", "Org", and "Account" fields.
- Callout 4:** "Enter date funds end (if time-limited), annual amount, and percentage of FTE." points to the "Date Funds End", "Annual Amount", and "Percentage of FTE" fields.
- Callout 5:** "Complete this page by clicking on Save and Next>>" points to the "Save" and "Next>>" buttons at the bottom right.

The form fields include:

- State Appropriated Funding / Non-State Appropriated Funding (Please select)
- If non-state, select source of funding (Please select)
- Additional funding source information (If "Other" selected above, designate source. Provide position number if funds are being transferred from another position. Attach Budget Revision Form as Supplemental Document if necessary to transfer funds.)
- Is this position partially or fully funded on ARRA stimulus monies? (Yes/No)
- Budget Code (Please select)
- Fund (Format: 6 digit number #####)
- Org (Format: 5 digit number #####)
- Account (Format: 5 digit number #####)
- Program (Format: 3 digit number ###)
- Date Funds End
- Annual Amount
- Percentage of FTE
- Remove Entry? (checkbox)
- Add Funding Source Details Entry (button)
- Save, << Prev, Next >> (buttons)

Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

When modifying a position in the system the first time, all required sections must be completed. Subsequent modifications to the position may or may not require revision of the ADA requirements.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click "Next>>" to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)

*** Required Information**

ADA Compliance Information

The physical activity of this position (Check all that apply and at least one)

- ☐ Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized. This factor is important if the amount and kind of climbing required exceeds that required for ordinary locomotion.
- ☐ Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. This factor is important if the amount and kind of balancing exceeds that needed for ordinary locomotion.
- ☐ Stooping: Bending body downward and forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
- ☐ Kneeling: Bending legs at knee to come to a rest on knee or knees.
- ☐ Crouching: Bending the body downward and forward by bending leg and spine.
- ☐ Crawling: Moving about on hands and feet.
- ☐ Reaching: Extending hand(s) and arm(s) in any direction.
- ☐ Standing: Particularly for sustained periods of time.
- ☐ Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another.
- ☐ Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.
- ☐ Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
- ☐ Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. This factor is important if it occurs to a considerable degree and requires the substantial use of the upper extremities and back muscle.
- ☐ Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.
- ☐ Grasping: Applying pressure to an object with the fingers and palm.
- ☐ Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of finger tips.
- ☐ Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
- ☐ Hearing: Perceiving the nature of sounds at normal speaking levels with or without correction. Ability to receive detailed information through oral communication, and to make fine discrimination in sound.
- ☐ Repetitive motions: Substantial movements (motions) of the wrists, hands, and/or fingers.

This field is required.

The physical requirements of this position (Select One)

Please select This field is required.

Select one from the drop down list.

The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)

- ☐ The worker is required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; extensive reading; visual inspection involving small defects, small parts, and/or op.
- ☐ The worker is required to have visual acuity to perform an activity such as: operates machines such as lathes, drill presses, power saws and mills where the seeing job is at or within arm's reach; performs mechanical or skilled trades tasks of a non-re.
- ☐ The worker is required to have visual acuity to operate motor vehicles or heavy equipment.
- ☐ The worker is required to have visual acuity to determine the accuracy, neatness, and thoroughness of the work assigned (i.e., custodial, food services, general laborer, etc.) or to make general observations of facilities or structures.

This field is required.

The condition the worker will be subject to in this position (Check all that apply and at least one)

- ☐ The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes.
- ☐ The worker is subject to outside environmental conditions: No effective protection from the weather.
- ☐ The worker is subject to both environmental conditions: Activities occur inside and outside.
- ☐ The worker is subject to extreme cold: Temperatures typically below 32 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind or humidity.
- ☐ The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour.
- ☐ The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the ambient noise level.
- ☐ The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.
- ☐ The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, exposure to high heat or exposure to chemicals.
- ☐ The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system of the skin: Fumes, odors, dusts, mists, gases or poor ventilation.
- ☐ The worker is subject to oils: There is air and/or skin exposure to oils and other cutting fluids.
- ☐ The worker is required to wear respirator.
- ☐ The worker frequently is in close quarters, crawl space, shafts, man holes, small enclosed rooms, small sewage and water line pipes, and other areas which could cause claustrophobia.
- ☐ The worker is required to function in narrow aisles or passage ways.
- ☐ The worker is exposed to infectious diseases.
- ☐ The worker is required to perform administrative work.
- ☐ None: The worker is administrative work.

This field is required.

Complete this page by clicking on

Save and

Check all that apply and at least one in this section.

Check all that apply and at least one in this section.

Do these need to be copied in, or can the user guide link these headings link back to Create New? The information is the same.

Supplemental Documents Tab

The **Supplemental Documents Tab** allows you to upload documents as attachments that will route with the request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- **Create New:** Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing:** Choose this option if you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.