NC STATE UNIVERSITY

PeopleAdmin Training Guide – Position Management

04/2019

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Introduction of Position Management

Welcome to the Position Management module of PeopleAdmin. In this module, you will have the ability to create and/or modify job descriptions for SHRA and EHRA positions. The position description is the base for any job and helps applicants and employees understand what they will be doing for North Carolina State University, your college/unit, and your department. The Position Management module is also used to submit salary increases for current employees.

During this training document, we will cover:

1. How to create a new SHRA/EHRA position and secure the proper approvals for posting the new position.

2. How to fill a vacant position using an existing job description.

3. How to update an existing job description with an incumbent seated in the position without desiring to post the position.

Helpful links:

SHRA Classification

SHRA Compensation

EHRA Faculty Classification

EHRA Non-Faculty Classification

EHRA Non-Faculty Research Matrix

EHRA Compensation

EHRA Position Action Matrix

IRIT Criteria Guidance

PeopleAdmin 7 System and Resources

Login Information:

1. For employee users: Go to website address: https://jobs.ncsu.edu/hr and click on the Single Sign-On (SSO) Authentication link. Note: You may be prompted to login using multi-factor authentication at this point.

2. You will login with your current myPACK Unity ID.

Request access and modify information

If you are a new employee or requesting access for the first time, follow these steps:

1. Go to https://hr.ncsu.edu/peopleadmin/peopleadmin-request-form/
2. On the selection screen, select your two-digit OUC.
3. When selected, a name will appear in the "Requestor" field
4. Contact the person in the "Requestor" field and email (or call) him or her to give you access to the PeopleAdmin system.
5. Please include what type of access you are requesting (initiator-most common, approver, unit AA, non-UTS or Department Viewer).
6. The "requestor" will "evaluate" the request and will decide if it is to be approved or not.
7. Once approved (by the Requestor and HR), PeopleAdmin can be accessed.

Home Page:

Once you have logged into PeopleAdmin, the Home Page will display an inbox, watch list, and other items where you easily navigate to actions which need your attention. Below is a detailed list of the Home Page and the functions available:

Functional Area	Location	Definition
Inbox	**CENTER** of Home Page upon log in	Displays all items requesting your attention (approval/review).
Watch List	**BOTTOM** of Home Page upon log in	Displays any request you are watching (postings, position actions) for easy access.
My Profile Help	Columns at **TOP** of screen	Used to update your user account details and online help for using the system.
Module Type Selection Hire Positions	Upper **RIGHT** hand corner of screen	Used to toggle between the Position Management and Applicant Tracking modules.
User Group Selection Initiator	Upper **RIGHT** hand corner next to your name	Displays the user groups available to you and the arrow will toggle you into each user group.

Module Type Definitions

Positions	Used to create or modify Position Descriptions, salary adjustments, view Position Descriptions, and submit Position Actions.
Hire	Used to create and view Job Postings, view Applicants and application materials, and complete Hiring Proposals.

Position Management User Group Definitions

Initiator – *Creates position action*. Enters/verifies title, requirements, and essential functions.

Approver – *Reviews/Approves*. Verifies title, approval of creation, etc. (Can have multiple Approvers as needed)

Unit Fiscal/AA Officer – *Reviews/Approves*. Reviews/Approves funding sources (if not already done by an approver), budget and/or affirmative action (Can have multiple Officers as needed)

University AA Officer – *Reviews/Approves*. Reviews New EHRA Faculty positions, Waivers and EHRA Hiring Proposals.

HR Class & Comp – *Reviews/Endorses.* Reviews/endorses title, assigns position number. Sends final confirmation via e-mail to department once Action is endorsed.

Please note: Individuals may have only one user group or may be assigned to more, depending on their role within the approval process for actions.

EHRA Non-Faculty Position Action Workflow:

| Initiator | → | Approver | → | Unit Fiscal/AA officer | → | HR Class & Comp |

EHRA Faculty Position Action Workflow:

| Initiator | → | Approve | → | Unit Fiscal/AA | → | HR Class & Comp | → | Univ AA Officer |

SHRA Position Action Workflow:

| Initiator | → | Approver | → | Unit Fiscal/AA officer | → | HR Class & Comp |

Position Management Module

Core Functions of the Position Management Module

- View position descriptions
  - o Hover over 'Position Descriptions' and click SHRA or EHRA
- Create, refill, or modify position actions (position descriptions)
  - o Hover over 'Position Descriptions' and click SHRA or EHRA
- View actions in process and all approved actions
  - o Hover over position descriptions and click SHRA Actions or EHRA Actions

*All job postings must first have an approved action prior to initiating a posting.

Position Management Module
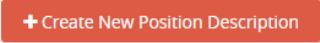
Creating and Requesting a New Position:

1.   Verify you are in the 'Position Management' module (orange header) and authorized to create a position description. You must be logged in as an "Initiator" for your department in order to initiate an action.
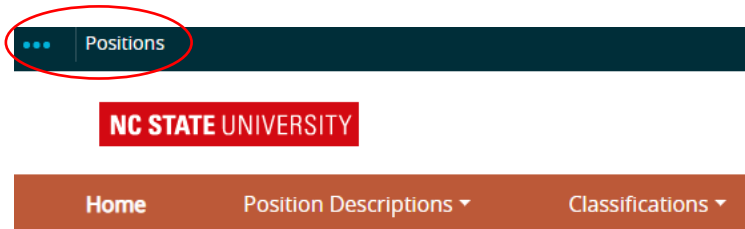
2.   Hover over 'Position Descriptions' and EHRA or SHRA. **Note: "Actions" allows you to view actions in process and all approved actions**
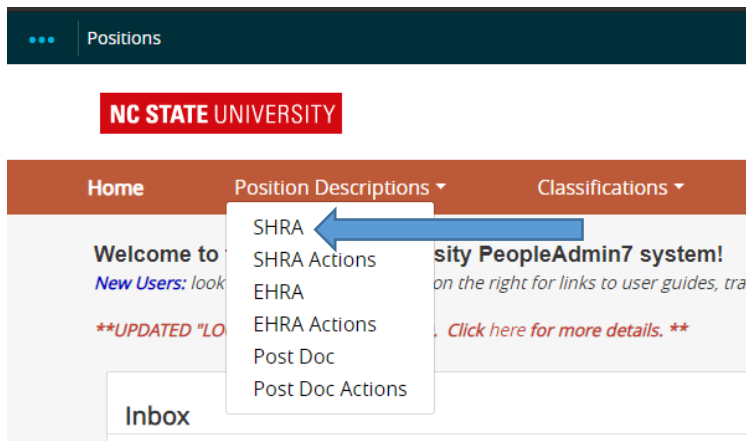
3.   Click the Create New Position Description **+ Create New Position Description** button at the top right corner.

4.   Enter the proposed position working title.

Position Management Module

5. If you are creating a new position, then follow Step a. If you are cloning an existing position within your department, then follow Step b.

a. The Organization Unit section should default to your own College/Division/Unit. If you have responsibility for more than one area, you will have to choose from the corresponding drop-down list. Then press the **Start Action** [Start Action] button.

New Position Description   [Start Action] [Cancel]

To create a new Position Description, select a title and Organizational Unit. Select a Position Description below to clone from an existing Position Description.

Working Title *   [   ]

Organizational Unit

College/Division *   19 - College of Veterinary Medicine (CVM)

Department *   [▼]

b. If you have an existing position description within your department(s) you wish to copy or 'clone', type in the position and click "Search." Choose the position number from the search results.

[Saved Searches ▼]   [   ]   [Search] [Q More Search Options ▼]

Clone an existing Position Description?

Position Number	Classification Title	Job Code	Band Level	JCAT	Working Title
00041971	Administrative Support Specialist	10422	Advanced	530X00	Graduate Services Coordinator
00046506	Technology Support Analyst	12249	Journey	463X00	Technology Support Analyst
00041850	Accounting Technician	10750	Journey	512x00	Accounting Technician
00102413	Technology Support Analyst	12249	Journey	463X00	Computer Support Analyst

Position Management Module

6.   Within the position description, selecting **Next** [Next >>] automatically saves the information on the screen and moves you to the next action on the list. Note: You can navigate between the sections simply by selecting one of the Editing Action options.

Editing Action

General Information
Position Information
⊘ Salary
Job Description
⊘ Position Documents
⊘ Recruitment
⊘ Supplemental Questions
⊘ Applicant Document
Action Summary

If you added or changed information within a section, be sure to **Save** [Save] before selecting a new **Editing Action.**

7.   Complete all required information in each of the sections which are listed on the left hand side of the screen (Editing Actions). Please note that if you 'cloned' from an existing position description many of the fields will be prepopulated and ready for you to edit if applicable.

8.   The next few pages will navigate you through the Editing Actions and describe the field information needed to complete the Action.

Position Management Module

Action Information

Action Number

Initiator
> [Select Some Options]
>
> *Select your name or the name of the person responsible for initiating actions on this position.*

Will you be recruiting
* once position is
approved?
> [▼]
>
> This field is required.
>
> *If Yes, please complete the the tabs in the Recruitment tab and all subsequent tabs below Recruitment. If No, stop after attaching the required documents on the Position Documents tab and proceed to Action Summary to finalize and submit the action.*

Type of SPA Action
- ☐ New Position
- ☐ Temporary Salary Adjustment
- ☐ Salary Adjustment
- ☐ Extend Temporary Salary Adjustment
- ☐ Reclassification
- ☐ Level Change
- ☐ Update Description
- ☐ FTE Increase
- ☐ FTE Decrease
- ☐ Time-Limited Status Change
- ☐ Academic Year (9 month) / Fiscal Year (12 month) Change
- ☐ EHRA-to-SHRA Conversion
- ☐ Study (Prior Discussion with Classification & Compensation Required)
- ☐ Review of FLSA Designation
- ☐ Position Description Entry Only - No Action Requested
- ☐ FLSA-related Adjustment

* Basis for Request
>
> This field is required.
>
> *Use this field to explain the position's new permanent or temporary duties, to communicate your need to establish a brand new position, or to include any additional information pertinent to the request.*

* Proposed Effective Date
> This field is required.

Incumbent Name

Incumbent Employee ID

Supervisor/Reports To

* Supervisor Position
Number
> This field is required.

* Supervisor Title
> This field is required.

* Supervisor Name
> This field is required.

Position Management Module

Action Number – This will populate once the Action is routed to the Approver.

Initiator – Names of employees within your College/Division/Department who have access to the position.

Will you be recruiting once the position is approved? - Select 'Yes' or 'No' if recruitment will follow the position action. This is a required field.

Type of SHRA/EHRA Action – The type of Action must be selected from the options. For NEW positions, select New Position.

Basis for Request - Explains why the position is being entered. Use this field to explain the position's new permanent or temporary duties, to communicate your business need to establish a brand new position, or to include any additional information pertinent to the request. If the position is being compared to another, indicate the position number of the peer position. This is a required field.

Proposed Effective Date – Enter in the proposed effective date, or the 1st of the month the position will be created. This is a required field.

Incumbent Name – If the position is filled, include the name of the employee. If the employee has resigned, this field may be left blank.

Incumbent Employee ID – If the position is field, include the employee ID of the employee. If the employee has resigned, this field may be left blank.

Supervisor Position Number – Include supervisor position number. This is a required field.

Supervisor Title – Include supervisor position title. This is a required field.

Supervisor name – Include supervisor name. This is a required field.

Position Management Module

General Information

Department ID 195001 - Dept of Clinical Sciences

★ **Position Number**

This field is required.

Enter the Position Number if Established Prior to November 1, 2011. For a New Position, type "New".

Appointment Please select ▼

FTE

#.##

Time Limited? ☐

Time-Limited Appointment Length

(Ex: 6 months, 1 year, 2 years 3 years. SHRA positions can be no longer than 3 years)

This field cannot be left blank if the "Time Limited" field above is checked.

Classification

Working Title Administrative Support Associate

Current Classification Title

Current Band Level Please select ▼

This field will populate upon completion of HR review.

★ **Proposed Classification Title**

This field is required.

*SPA Classification titles can be found here: http://www.ncsu.edu/human_resources/classcomp/jobtitles.php

★ **Proposed Band Level** Please select ▼

This field is required.

Endorsed Classification Title

This field will populate upon completion of HR review.

Endorsed Band Level Please select ▼

Funding Source

★ **Is this position partially or fully funded on ARRA stimulus monies?** ▼

This field is required.

★ **State Appropriated Funding / Non-State Appropriated Funding** Please select ▼

This field is required.

Funding Source

★ **Is this position partially or fully funded on ARRA stimulus monies?** ▼
This field is required.

★ **State Appropriated Funding / Non-State Appropriated Funding** Please select ▼
This field is required.

Funding Source Details

At least one funding source is required. If multiple funding sources, the percentages must total 100%.

Click on **Add Funding Source Details Entry** to provide the funding information. Continue to click as needed for adding multiple funding sources.

[Add Funding Source Details Entry]

Position Management Module

General Information

Department ID – Department ID will populate.

Position Number – If the Action is on an EXISITING position, enter the position number, if the Action request is for a NEW position, type in the word "New." ***Important: If cloning a position, delete the current position number and type in the word "New."*** This is a required field.

Appointment – Select appointment length from the drop-down menu.

FTE – Enter the FTE of the position (full time, 1.0 FTE positions are 2080 hours per fiscal year). If the position works less than 40 hours per week 52 weeks per year, calculate the FTE percentage by multiplying the number of hours per week (example: 32 hours/week) by the number of weeks worked per year (example: 52 weeks/year) and divide by 2080 (32*52 = 1664/2080 = 80% or .8 FTE)

Time Limited? – If the position is time-limited, check the indicator box (SHRA positions only).

Time-Limited Appointment Length – Enter time-limited appointment length. (Ex: 6 months, 1 year, 2 years, 3 years. SHRA positions can be no longer than 3 years)

Classification

Working Title – This will populate from the previous screen.

Current Classification Title – If the request is to change the Title or Level of the position, enter the current title (and band level if SHRA, i.e. Contributing, Journey or Advanced), otherwise, leave blank.

Current Band Level – Select the current band level if existing position.

Proposed Classification Title – Enter the proposed Classification Title. This is a required field. SHRA Career Bands/Classifications can be found here: SHRA Career Bands

Proposed Band Level – Enter the proposed band level. This is a required field.

Endorsed Classification Title – This field will populate upon completion of HR review.

Endorsed Band Level – This field will populate upon completion of HR review.

Funding Source

Is this position partially or fully funded on ARRA stimulus monies? - Select "Yes"/"No" from the drop down if the position is partially of fully funded on ARRA stimulus monies. This is a required field.

State Appropriated Funding/Non-State Appropriated Funding - Select if the position is "State Appropriated"/"Non-State Appropriated" or "Both." This is a required field.

Funding Source Details

The Funding Source Details section is required. At minimum, the Project Code and Percentage of Funding on that Project Code must be completed (until the total equals 100%). Click "Add Funding Source Details Entry" to add sources.

Salary Information

If the position is vacant, provide the proposed amount in the budget.

Budget Amount/Current Annualized Salary

If the position is filled, provide the current salary for the incumbent.

SPA Salary Reference Rates:http://www.ncsu.edu/human_resources/classcomp/pdf/cbRates_alpha.pdf#zoom=150

Salary Adjustment Request

Not applicable for new or vacant positions.

Type of Salary Adjustment

Please select ▼

Proposed Annualized Salary

Endorsed Annualized Salary

This field will populate upon completion of HR review.

Required Details for Temporary Salary Adjustments

Not applicable for new or vacant positions

Proposed Begin Date for Temporary Increase:

Proposed End Date for Temporary Increase:

Salary Information

Budget Amount/Current Annualized Salary - Provide the proposed amount in the budget.

Salary Adjustment Request - Not applicable for new or vacant positions

Required Details for Temporary Salary Adjustments – Not applicable for new or vacant positions

Position Management Module

Change Request Information

For EHRA salary adjustment only – complete the Change Request information fields. If EHRA Action does not include a salary adjustment, skip this section.

Change Request Information

Complete the below fields for actions that include a salary adjustment. If this action does not impact salary, leave the fields blank and proceed to the Funding Source section below.

Proposed Salary

Percent Change Over Current Salary

Dollar Increase

Salary as of June 30 of previous fiscal year

Percent change over June 30 previous fiscal year salary

Increase amount over June 30 previous fiscal year salary

Position Management Module

Position Information

Primary Function of Organizational Unit *

This field is required.
The information in the box above will show in the posting.

General Scope of Duties *

This field is required.
The information in the box above will show in the posting.

Description of Competencies and Related Job Duties

To enter the position description details, please click the "Add Description of Competencies and Related Job Duties Entry" button. The total percentage of time allocated for all the tasks and responsibilities must equal 100%. Note: A minimum of two competencies are required.

*SPA Classification titles can be found here: http://www.ncsu.edu/human_resources/classcomp/jobtitles.php.

[Add Description of Competencies and Related Job Duties Entry]

Other Duties and Responsibilities

Other Work/Responsibilities

The information in the box above will show in the posting.

Job City & State

Format: City, State

Supervisory

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:

Number of Permanent Employees this Position Supervises

Primary Function of Organization Unit - Use this space to describe the organization unit and why it is a great place to work.

General Scope of Duties - Enter a summary of the position responsibilities. This is the Major Function section from the position description. Use this space to describe the job, but also to "sell" the job to potential candidates. If you are cloning a position, this will default from the cloned position and can be edited as appropriate.

Description of Competencies and Related Job Duties - The responsibilities are the job duties/tasks performed by the position. At least 3 responsibility entries are required. The total percentage of time for all responsibilities should equal 100%. You will also need to select at least one Marginal responsibility. Select **Add Responsibilities Entry** to add a new entry. If you need to remove an entry, check the "Remove Entry?" box. Once you progress the next page it will be removed.

Other Work/Responsibilities - Enter any additional information related to the position not captured above; this information will transfer over to the posting

Job City & State - Enter City and State position will be located

Supervisory - Enter the number of permanent employees the position will supervise.

Position Management Module

Requirements and Preferences

Identify if the Position is Mandatory/Essential/Key *

Please select ▼

This field is required.

Description of options: http://www.ncsu.edu/human_resources/hrim/Mandatory-Essential_Key-SelectingFieldValue.php

The information in the box above will show in the posting.

Work Schedule *

This field is required.

The information in the box above will show in the posting.

Does the regular and recurring schedule of this position result in the employee working more than ½ of their hours between 4 pm and 8 am? (Meal periods do not count). *

▼

This field is required.

Minimum Experience/Education

The information in the box above will show in the posting.

This field will populate upon completion of HR review

Preferred Minimum Experience/Education *

This field is required.

Please type ""N/A"" if specific information is not applicable.

The information in the box above will show in the posting.

Knowledge, skills, and abilities necessary to perform job duties *

This field is required.

Please type "N/A" if specific information is not applicable.

The information in the box above will show in the posting.

Required License or Certification *

This field is required.

Please type ""N/A"" if specific information is not applicable.

The information in the box above will show in the posting.

Valid NC Driver's License required? *

▼

This field is required.

The information in the box above will show in the posting.

Commercial Driver's License Required? *

▼

This field is required.

The information in the box above will show in the posting.

Physical Required? *

▼

This field is required.

List any other medical/drug tests required

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Position Management Module

Identify if the Position is Mandatory/Essential/Key – Select from the drop-down menu if position is Mandatory/Essential or Key. This is a required field.

Work Schedule – Enter work schedule and complete with as much detail as possible. This is a required field.

Does the regular and recurring schedule of this position result in the employee working more than ½ of their hours between 4 pm and 8 am? (Meal periods do not count) – Select 'Yes' or 'No' from the drop-down menu if this applies. This is a required field.

Minimum Education/Experience –
For SHRA positions, this will default/populate based on the selected classification. Requirements can be found here based on the classification: SHRA Career Bands
For EHRA positions – Enter in the proposed education and experience. This is a required field.

Preferred Minimum Experience/Education – Enter the preferred minimum experience/education. This is a required field.

Knowledge, skills, and abilities necessary to perform job duties – Enter KSA's needed to perform the job duties (ex: Excellent written and oral communication skills, Ability to provide advice and counsel). This is a required field.

Required License or Certification – Enter any required licenses or certification. Type "N/A" if none. This is a required field.

Valid NC Driver's License required? Select "Yes" or "No" if a valid NC Driver's License is required to perform the primary function of the job. This is a required field.

Commercial Driver's License Required? Select "Yes" or "No" if a valid NC Commercial Driver's License is required to perform the primary function of the job. This is a required field.

Physical Required? Select "Yes" or "No" if a physical is required. This is a required field.

List any other medical/drug tests required - Complete this field if there are any other medical/drug tests based on the requirements of the job.

Position Management Module

"To add a document to the position, hover over the blue **Action** text link to the right of the document name.

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

Documents can be uploaded by browsing for the document or a document can be written or previously selected. Document types that are supported as attachment include .doc, .docx, .pdf, .rtf, .rtx, .txt, .tiff, .tif, .jpeg, .jpe, .jpg., png, .xls and .xlsx. All documents uploaded will be converted to .pdf for security.

Click Save to update conversion status."
PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
* Organizational Chart (Required)			Actions ⌄
* ADA Checklist (Required) - Form found at https://hr.ncsu.edu/wp-content/uploads/2016/08/adachk.pdf			Actions ⌄
Other Document 1			Actions ⌄

Position Documents:

A current Organizational Chart and ADAAA Checklist are required when creating a new SHRA and EHRA position. These are the only two required documents. However, if there is additional documentation that is relative to the position, there are "Other Documents" options for uploading.

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Recruitment Details

Would you like University Temporary Services to contact you for temporary staffing assistance? [▼]

For more information, visit: http://www.ncsu.edu/human_resources/uts/.

Anticipated Hiring Range [   ]

The information in the box above will show in the posting.

Internal Transfer Only [▼]

If you anticipate multiple hires from this search, please indicate how many [   ]

Recruitment Dates

Proposed Start Date [   ]

Advertising

Post on Monster? [▼]

Post on InsideHigherEd.com? [▼]

Post to Higher Ed Jobs? [No ▼]

Places you would like to recruit [   ]

All advertisements must contain the equal opportunity/affirmative action, and sexual orientation clauses.

Applicant Information

Special Instructions [   ]

Position Management Module

Recruitment Details: *If there is NOT a recruitment following the creating of the position or Action, you may skip this section and progress to the next screen.*

Would you like University Temporary Services to contact you for temporary staffing assistance? - University Temporary Services (UTS) can assist you in hiring a temporary employee during the recruitment period. Select "Yes" or "No" in the drop-down menu if you would like to be contacted. More information can be found: University Temporary Services

Anticipated Hiring Range –Enter an exact amount or range, or "Commensurate with Experience."

Internal Transfer Only – Select "Yes" or "No" if the hiring manager wishes to only consider internal NCSU employees (Permanent SHRA, EHRA and time-limited only). Contact your Talent Consultant for further guidance.

If you anticipate multiple hires from this search, please indicate how many – Enter the number of hires if there are multiple hires for this position. **Please note: The position description and duties must be identical for each hire.**

Recruitment Dates:

Proposed State Date – Enter the proposed state date

Advertising:

Post on Monster? – Select "Yes" or "No" if you would like your position to be posted. This is a free service.

Post on InsideHigherEd.com? – Select "Yes" or "No" if you would like your position to be posted. This is a free service.

Post to Higher Ed Jobs? – Select "Yes" or "No" if you would like your position to be posted. This is a free service.

Places you would like to recruit – Optional: You may choose to advertise in other publications. Upload a draft of the advertisement in the "Other Documents" section in "Position Documents" and UHR can provide a quote.

Application Information:

Special Instructions - The department can provide special instructions to applicants. For ex: "Please attached a resume/CV, cover letter and contact information for three professional references."

Position Management Module

Supplemental Questions

| | | Save | << Prev | Next >> |

Adding New Supplemental Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing question or create a new one.

Adding Existing Supplemental Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category.

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the supplemental question.

Supplemental Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.
Included Supplemental Questions

Add a question

| Position | Required | Category | Question | Status |

Supplemental Questions: *If there is NOT a recruitment following the creating of the position or Action, you may skip this section and progress to the next screen.*

In PeopleAdmin, you can add your own supplemental questions to your position. These are questions that you want your applicants to answer during their application process. These questions can take many different forms (open-ended or multiple choice) and can be used as a screening tool when reviewing applications. Instructions for how to add or create supplemental questions are located within the page.

Applicant Document

Select the documents to be required with this item, and those that may optionally be attached. Document types marked "Not Used" cannot be attached to this item.

Order	Name	Not Used	Optional	Required
1	Resume	◉	○	○
2	Cover Letter	◉	○	○

Applicant Documents: *If there is NOT a recruitment following the creating of the position or Action, you may skip this section and progress to the next screen.*

This is where you decide what documents you want your applicants to attach in addition to their application. The most common attachments are Resume (or CV), Cover Letter and Contact information for references. Applicant documents can be included in the application process by selecting **Optional** to make the documents optional and **Required** to make the document(s) mandatory to complete the application process.

Position Management Module

Waivers (EHRA Positions Only)

Search Waiver Requests– If you will be requesting a search waiver (to appoint an individual to this position without conducting a search), contact the Office for Institutional Equity and Diversity (OIED) / (919) 515-3148 to receive an endorsement. Once approved, they will provide you with an OIED Approval Code to enter in the Action.

Waiver

ᴬᴮᶜ Check spelling

Waiver Details

OIED Employment and Hiring
OIED Staff Directory

OIED Approval Code

Before Submitting a Waiver Request OIED should be contacted and they will provide you with an approval code to enter here.

Name of Waived Employee

Nature of Waiver Appointment

Please select

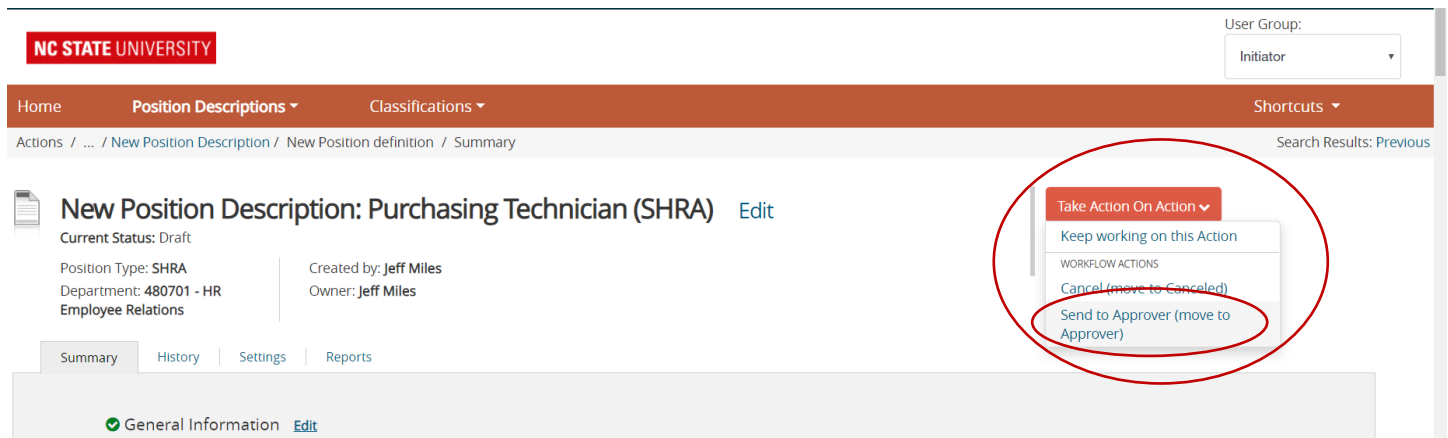| |
|---|
| **Please select** |
| Distinguished or Named Professor |
| Promotion |
| Dual Career/Spousal Hire Appointment (Reference position # of spousal hire in Basis for Request on the General Information page) |
| Person named in grant |
| Transfer |
| Other (explain in Basis for Request on the General Information page) |
| N/A - Not Applicable |

Position Management Module

<u>Routing / Take Action Summary:</u>

When you reach this screen, your position is completed and you are now ready to route for approval.

The first step is to ensure that all sections have a green check ⊘ mark.

An orange exclamation point ❗ that means that there is a required field that has not been completed. Select the blue **Edit** link for that section to go back and make the required updates. Select **Save** or **Next** to save and continue. After saving, you can move to the Action Summary to review the final information for additional errors.

Once all the sections have a ⊘ , you are ready to route this. Select the "**Take Action On Action**" button in the upper right. You will receive multiple options on what action to perform. Select "Send to Approver" and select the appropriate approver from the drop-down menu to route to.

EXTREMELY IMPORTANT- You have the option to add comments. These comments are saved with the position and **<u>cannot be erased.</u> These comments will be viewable by anyone who accesses the posting and are an official part of the recruitment file.**

Finally, select **Submit** to finish routing the position. You should see "Action was successfully transitioned" (below) when the position has been routed to your selected approver. Once you submit your completed position description, a unique Action Number will be assigned to your action. This number will be found at the top of the Position Details page (ex: AC123456SP or EP). Record this number for future use

Position Management Module

Take Action On Action ▾

🖶 Print Preview

🔖 Add to Watch List

If you want watch this position and access it easily later, add it to your watch list to be able to view it quickly from your home screen.

Congratulations, you have successfully completed routing a NEW position, but what if you want to modify (re-class, etc.) a current position? That is explained in the next section.

Updating an Existing Position Description

(for a current incumbent):

1. Verify you are in the 'Position Management' module (orange header) and authorized to create a position description. You must be logged in as an "Initiator" for your department in order to initiate an action.
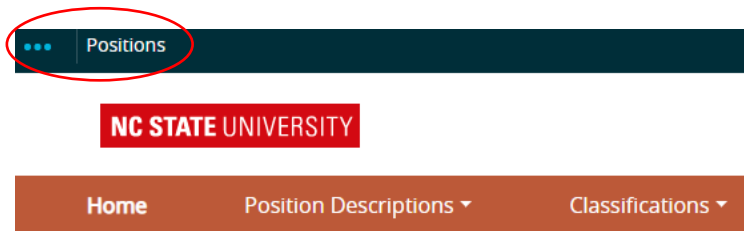
2. Hover over 'Position Descriptions' and select either EHRA or SHRA. **Note: "Actions" allows you to view actions in process and all approved actions**
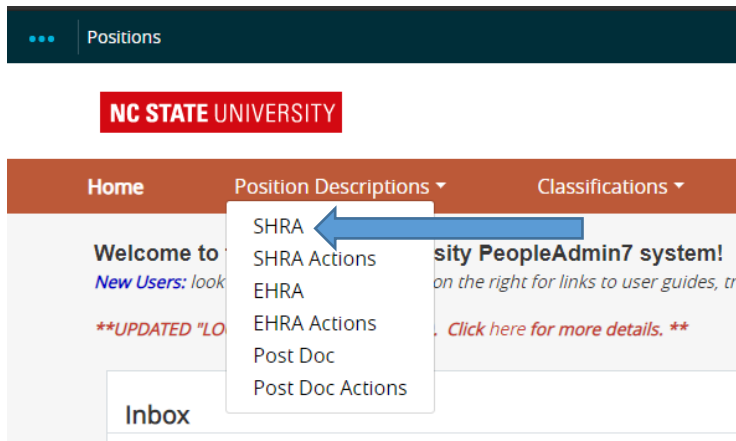
3. From the list of positions, locate which one you would like to modify/update by search by position number. Once you have located the position description, click the desired position number hyperlink.

4. Click on the ⭐ Update/Fill Position Description Update/Fill Position button located in the upper right portion of the screen. Confirm you chose the correct position description and click the **Start** button.

Position Management Module

Note: You can navigate between the sections simply by selecting one of the Editing Action options.

Editing Action
General Information
Position Information
⊘ Salary
Job Description
⊘ Position Documents
⊘ Recruitment
⊘ Supplemental Questions
⊘ Applicant Document
Action Summary

If you added or changed information within a section, be sure to **Save** before selecting a new **Editing Action.**

5.   Complete all required information in each of the sections which are listed on the left hand side of the screen (Editing Actions).

6.   The next few pages will navigate you through the Editing Actions and describe the field information needed to complete the Action

Position Management Module

Action Information

Action Number

Initiator
    Select Some Options

Select your name or the name of the person responsible for initiating actions on this position.

⭑ Will you be recruiting once position is approved?
    ▼

This field is required.

If Yes, please complete the the tabs in the Recruitment tab and all subsequent tabs below Recruitment. If No, stop after attaching the required documents on the Position Documents tab and proceed to Action Summa

Type of SPA Action

☐ New Position
☐ Temporary Salary Adjustment
☐ Salary Adjustment
☐ Extend Temporary Salary Adjustment
☐ Reclassification
☐ Level Change
☐ Update Description
☐ FTE Increase
☐ FTE Decrease
☐ Time-Limited Status Change
☐ Academic Year (9 month) / Fiscal Year (12 month) Change
☐ EHRA-to-SHRA Conversion
☐ Study (Prior Discussion with Classification & Compensation Required)
☐ Review of FLSA Designation
☐ Position Description Entry Only - No Action Requested
☐ FLSA-related Adjustment

⭑ Basis for Request

Refill position due to current employee resigning.

Use this field to explain the position's new permanent or temporary duties, to communicate your need to establish a brand new position, or to include any additional information pertinent to the request.

⭑ Proposed Effective Date
    06/01/2019

Incumbent Name
    Andrew

Incumbent Employee ID
    Green

Supervisor/Reports To

⭑ Supervisor Position Number
    00000100

⭑ Supervisor Title
    Assistant Head

⭑ Supervisor Name
    Pamela Lowry

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Position Management Module

Action Number – This will populate once the Action is routed to the Approver.

Initiator – Names of employees within your College/Division/Department who have access to the position.

Will you be recruiting once the position is approved? - Select 'Yes' or 'No' if recruitment will follow the position action. **For updating a position for current incumbent, you should select 'No.'** This is a required field.

Type of SHRA/EHRA Action – The type of Action must be selected from the options. Multi-select is available if needed. EHRA Position Action Matrix can be found here.

Basis for Request - Explains why the position is being entered. Use this field to explain the position's new permanent or temporary duties, to communicate your business need to establish a brand new position, or to include any additional information pertinent to the request. If the position is being compared to another, indicate the position number of the peer position. This is a required field.

Proposed Effective Date – Enter in the proposed effective date. This is a required field.

Incumbent Name – Verify the incumbent name is accurate. This is a required field.

Incumbent Employee ID – Verify the incumbent Employee ID is accurate. This is a required field.

Supervisor Position Number – Verify the Supervisor Position Number is accurate. This is a required field.

Supervisor Title - Verify the Supervisor Title is accurate. This is a required field.

Supervisor name – Verify the Supervisor Name is accurate. This is a required field.

Position Management Module

General Information

Department ID 111801 - Entomology and Plant Pathology

Position Number 00041971

Job Code 10422

* **Appointment** [12 Month Recurring ▼]

FTE [1.00]
#.##

Time Limited? ☐

Time-Limited Appointment Length [   ]
(Ex: 6 months, 1 year, 2 years 3 years. SHRA positions can be no longer than 3 years)

This field cannot be left blank if the "Time Limited" field above is checked.

Classification

Working Title [Graduate Services Coordinator]

Current Classification Title [Administrative Support Specialist]
Complete if title is different than requested title below.

Current Band Level Advanced
This field will populate upon completion of HR review.

* **Proposed Classification Title** [University Program Specialist]
*SPA Classification titles can be found here: http://www.ncsu.edu/human_resources/classcomp/jobtitles.php

* **Proposed Band Level** [Contributing ▼]

Endorsed Classification Title Administrative Support Specialist
This field will populate upon completion of HR review.

Endorsed Band Level [Please select ▼]

Funding Source

* **Is this position partially or fully funded on ARRA stimulus monies?** [No ▼]

* **State Appropriated Funding / Non-State Appropriated Funding** [State Appropriated Funding ▼]

Position Management Module

General Information

Department ID – Department ID will populate.

Position Number –Verify position number is accurate. This is a required field.

Appointment – Select appointment length from the drop-down menu.

FTE – Enter the FTE of the position (full time, 1.0 FTE positions are 2080 hours per fiscal year). If the position works less than 40 hours per week 52 weeks per year, calculate the FTE percentage by multiplying the number of hours per week (example: 32 hours/week) by the number of weeks worked per year (example: 52 weeks/year) and divide by 2080 (32*52 = 1664/2080 = 80% or .8 FTE)

Time Limited? – If the position is time-limited, check the indicator box (SHRA positions only).

Time-Limited Appointment Length – Enter time-limited appointment length. (Ex: 6 months, 1 year, 2 years, 3 years. SHRA positions can be no longer than 3 years)

Classification

Working Title – This will populate from the previous screen.

Current Classification Title – If the request is to change the Title or Level of the position, enter the current title (and band level if SHRA, i.e. Contributing, Journey or Advanced), otherwise, leave blank.

Current Band Level – Select the current band level if existing position.

Proposed Classification Title – Enter the proposed Classification Title. This is a required field. SHRA Career Bands/Classifications can be found here: SHRA Career Bands

Proposed Band Level – Enter the proposed band level. This is a required field.

Endorsed Classification Title – This field will populate upon completion of HR review.

Endorsed Band Level – This field will populate upon completion of HR review.

Funding Source

Is this position partially or fully funded on ARRA stimulus monies? - Select "Yes"/"No" from the drop down if the position is partially of fully funded on ARRA stimulus monies. This is a required field.

State Appropriated Funding/Non-State Appropriated Funding - Select if the position is "State Appropriated"/"Non-State Appropriated" or "Both." This is a required field.

Funding Source Details

The Funding Source Details section is required. At minimum, the Project Code and Percentage of Funding on that Project Code must be completed (until the total equals 100%). Click "Add Funding Source Details Entry" to add sources.

Position Management Module

Salary Information

Budget Amount/Current Annualized Salary

45,000

If the position is vacant, provide the proposed amount in the budget.

If the position is filled, provide the current salary for the incumbent.

http://www.ncsu.edu/human_resources/classcomp/pdf/cbRates_alpha.pdf#zoom=150

Salary Adjustment Request

Not applicable for new or vacant positions.

Type of Salary Adjustment

Reclassification ▼

Proposed Annualized Salary

50,000

Endorsed Annualized Salary

$45,152

This field will populate upon completion of HR review.

Required Details for Temporary Salary Adjustments

Not applicable for new or vacant positions

Proposed Begin Date for Temporary Increase:

Proposed End Date for Temporary Increase:

Salary Information

Budget Amount/Current Annualized Salary - Provide the current salary for the incumbent.

Salary Adjustment Request -

Type of Salary Adjustment – Select Type of Salary Adjustment

Types of SHRA Salary Adjustment can be found here: SHRA Compensation

Types of EHRA Salary Adjustment can be found here: EHRA Compensation

Proposed Annualized Salary – Enter the proposed salary

Endorsed Annualized Salary – This field will populate upon HR review

Required Details for Temporary Salary Adjustments

Proposed Begin Date for Temporary Increase – Enter begin date for temporary increase, if applicable

Proposed End Date for Temporary Increase – Enter end date for temporary increase, if applicable

Position Management Module

Position Information

Primary Function of Organizational Unit *

This field is required.
The information in the box above will show in the posting.

General Scope of Duties *

This field is required.
The information in the box above will show in the posting.

Description of Competencies and Related Job Duties

To enter the position description details, please click the "Add Description of Competencies and Related Job Duties Entry" button. The total percentage of time allocated for all the tasks and responsibilities must equal 100%. Note: A minimum of two competencies are required.

*SPA Classification titles can be found here: http://www.ncsu.edu/human_resources/classcomp/jobtitles.php.

Add Description of Competencies and Related Job Duties Entry

Other Duties and Responsibilities

Other Work/Responsibilities

The information in the box above will show in the posting.

Job City & State

Format: City, State

Supervisory

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:

Number of Permanent Employees this Position Supervises

Primary Function of Organization Unit - Use this space to describe the organization unit and why it is a great place to work. Update only as needed.

General Scope of Duties – Provide updated duties as needed to support salary increase (if applicable).

Description of Competencies and Related Job Duties – Provided updated Competencies as needed to support salary increase (if applicable). The responsibilities are the job duties/tasks performed by the position. At least 3 responsibility entries are required. The total percentage of time for all responsibilities should equal 100%. You will also need to select at least one Marginal responsibility. Select **Add Responsibilities Entry** to add a new entry. If you need to remove an entry, check the "Remove Entry?" box. Once you progress the next page it will be removed.

Other Work/Responsibilities - Enter any additional information related to the position not captured above; this information will transfer over to the posting

Job City & State – Verify City & State is accurate.

Supervisory

Number of Permanent Employee this Position Supervises – Verify Number of Employees is still accurate.

Position Management Module

Requirements and Preferences

*	Identify if the Position is Mandatory/Essential/Key	[Please select ▼] This field is required. *Description of options: http://www.ncsu.edu/human_resources/hrim/Mandatory-Essential_Key-SelectingFieldValue.php* *The information in the box above will show in the posting.*
*	Work Schedule	[ ] This field is required. *The information in the box above will show in the posting.*
*	Does the regular and recurring schedule of this position result in the employee working more than ½ of their hours between 4 pm and 8 am? (Meal periods do not count).	[▼] This field is required.
	Minimum Experience/Education	*The information in the box above will show in the posting.* *This field will populate upon completion of HR review*
*	Preferred Minimum Experience/Education	[ ] This field is required. *Please type ""N/A"" if specific information is not applicable.* *The information in the box above will show in the posting.*
*	Knowledge, skills, and abilities necessary to perform job duties	[ ] This field is required. *Please type "N/A" if specific information is not applicable.* *The information in the box above will show in the posting.*
*	Required License or Certification	[ ] This field is required. *Please type ""N/A"" if specific information is not applicable.* *The information in the box above will show in the posting.*
*	Valid NC Driver's License required?	[▼] This field is required. *The information in the box above will show in the posting.*
*	Commercial Driver's License Required?	[▼] This field is required. *The information in the box above will show in the posting.*
*	Physical Required?	[▼] This field is required.
	List any other medical/drug tests required	[ ]

Position Management Module

Identify if the Position is Mandatory/Essential/Key – Select from the drop-down menu if position is Mandatory/Essential or Key. This is a required field.

Work Schedule – Enter work schedule and complete with as much detail as possible. This is a required field.

Does the regular and recurring schedule of this position result in the employee working more than ½ of their hours between 4 pm and 8 am? (Meal periods do not count) – Select 'Yes' or 'No' from the drop-down menu if this applies. This is a required field.

Minimum Education/Experience –
For **SHRA** positions, this will default/populate based on the selected classification. Requirements can be found here based on the classification: SHRA Career Bands
For **EHRA** positions – Enter in the proposed education and experience. This is a required field.

Preferred Minimum Experience/Education – Enter the preferred minimum experience/education. This is a required field.

Knowledge, skills, and abilities necessary to perform job duties – Enter KSA's needed to perform the job duties (ex: Excellent written and oral communication skills, Ability to provide advice and counsel). This is a required field.

Required License or Certification – Enter any required licenses or certification. Type "N/A" if none. This is a required field.

Valid NC Driver's License required? Select "Yes" or "No" if a valid NC Driver's License is required to perform the primary function of the job. This is a required field.

Commercial Driver's License Required? Select "Yes" or "No" if a valid NC Commercial Driver's License is required to perform the primary function of the job. This is a required field.

Physical Required? Select "Yes" or "No" if a physical is required. This is a required field.

List any other medical/drug tests required - Complete this field if there are any other medical/drug tests based on the requirements of the job.

Position Management Module

Position Documents:

Upload an updated organizational chart (if applicable) which identifies this position within the department or organization. Upload additional documents as required for this position. Scan and upload documents related to Search Waivers or documentation that may support the position update.

Recruitment:

If there is NOT a recruitment following the position update, you may skip this section and progress to the next screen. For recruitment instructions, please refer to page 21.

Supplemental Questions:

If there is NOT a recruitment following the position update, you may skip this section and progress to the next screen. For supplemental question instructions, please refer to page 23.

Applicant Documents:

If there is NOT a recruitment following the position update, you may skip this section and progress to the next screen. For Applicant Document instructions, please refer to page 23.
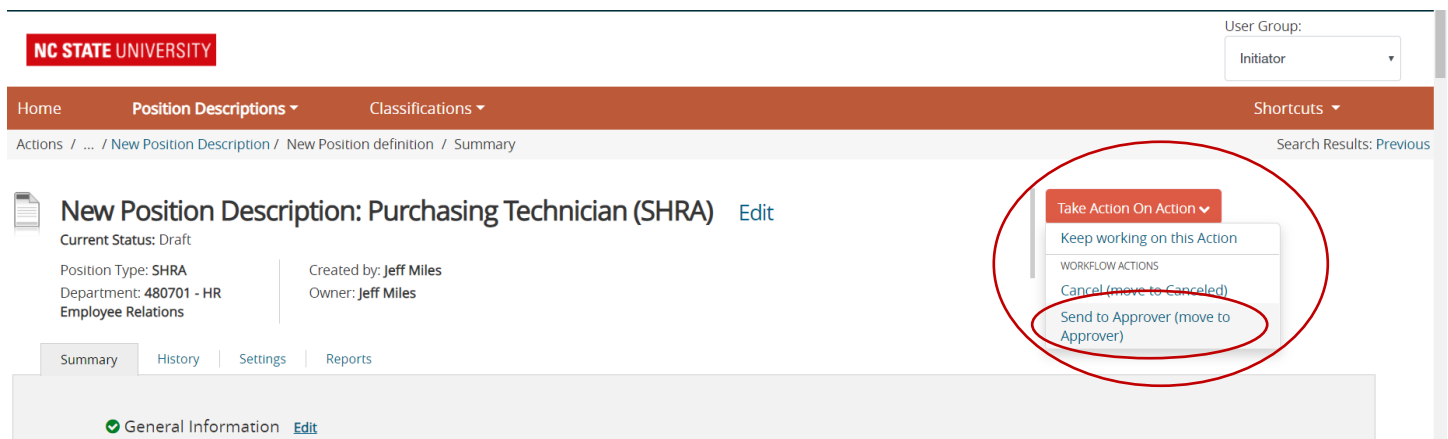
Routing / Take Action Summary:

When you reach this screen, your position update is completed and you are now ready to route for approval.

The first step is to ensure that all sections have a green check ✅ mark.

An orange exclamation point ⚠️ that means that there is a required field that has not been completed. Select the blue **Edit** link for that section to go back and make the required updates. Select **Save** or **Next** to save and continue. After saving, you can move to the Action Summary to review the final information for additional errors.

Once all the sections have a ✅, you are ready to route. Select the "**Take Action On Action**" button in the upper right. You will receive multiple options on what action to perform. Select "Send to Approver" and select the appropriate approver from the drop-down menu to route to.

EXTREMELY IMPORTANT- You have the option to add comments. These comments are saved with the position and **cannot be erased.** **These comments will be viewable by anyone who accesses the posting and are an official part of the recruitment file.**

Finally, select **Submit** to finish routing the position. You should see "Action was successfully transitioned" (below) when the position has been routed to your selected approver. Once you submit your completed position description, a unique Action Number will be assigned to your action. This number will be found at the top of the Position Details page (ex: AC123456SP or EP). Record this number for future use

Position Management Module

Take Action On Action ▾

🖶 Print Preview

🔖 Add to Watch List

If you want to watch this position and access it easily later, add it to your watch list to be able to view it quickly from your home screen.

Congratulations, you have successfully completed routing a position update.

Refilling a Current or Upcoming Vacant Position:

1. Verify you are in the 'Position Management' module (orange header) and authorized to create a position description. You must be logged in as an "Initiator" for your department in order to initiate an action.
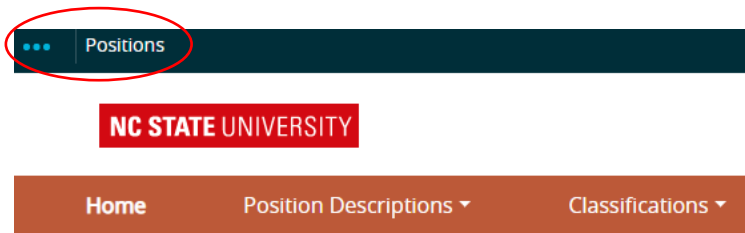
2. Hover over 'Position Descriptions' and EHRA or SHRA. **Note: "Actions" allows you to view actions in process and all approved actions**
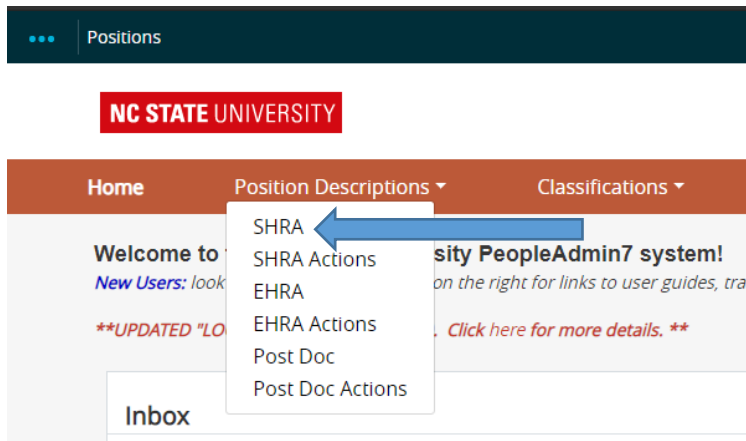
3. From the list of positions, locate which one you would like to update/refill by search by position number. Once you have located the position description, click the desired position number hyperlink.

4. Click on the ⭐ Update/Fill Position Description Update/Fill Position button located in the upper right portion of the screen. Confirm you chose the correct position description and click the **Start** **Start** button.

Position Management Module

5. Within the position description, selecting **Next** [Next >>] automatically saves the information on the screen and moves you to the next action on the list. Note: You can navigate between the sections simply by selecting one of the Editing Action options.

Editing Action
General Information
Position Information
✔ Salary
Job Description
✔ Position Documents
✔ Recruitment
✔ Supplemental Questions
✔ Applicant Document
Action Summary

If you added or changed information within a section, be sure to **Save** [Save] before selecting a new **Editing Action.**

6. Complete all required information in each of the sections which are listed on the left hand side of the screen (Editing Actions). Please note that if you 'cloned' from an existing position description many of the fields will be prepopulated and ready for you to edit if applicable.

7. The next few pages will navigate you through the Editing Actions and describe the field information needed to complete the Action.

Position Management Module

Action Information

Action Number

Initiator

[Select Some Options]

Select your name or the name of the person responsible for initiating actions on this position.

Will you be recruiting once position is approved? ★

[▼]

This field is required.

If Yes, please complete the the tabs in the Recruitment tab and all subsequent tabs below Recruitment. If No, stop after attaching the required documents on the Position Documents tab and proceed to Action Summary to finalize and submit the action.

Type of SPA Action

- ☐ New Position
- ☐ Temporary Salary Adjustment
- ☐ Salary Adjustment
- ☐ Extend Temporary Salary Adjustment
- ☐ Reclassification
- ☐ Level Change
- ☐ Update Description
- ☐ FTE Increase
- ☐ FTE Decrease
- ☐ Time-Limited Status Change
- ☐ Academic Year (9 month) / Fiscal Year (12 month) Change
- ☐ EHRA-to-SHRA Conversion
- ☐ Study (Prior Discussion with Classification & Compensation Required)
- ☐ Review of FLSA Designation
- ☐ Position Description Entry Only - No Action Requested
- ☐ FLSA-related Adjustment

Basis for Request ★

[ ]

This field is required.

Use this field to explain the position's new permanent or temporary duties, to communicate your need to establish a brand new position, or to include any additional information pertinent to the request.

Proposed Effective Date ★

[ ]

This field is required.

Incumbent Name

[ ]

Incumbent Employee ID

[ ]

Supervisor/Reports To

Supervisor Position Number ★

[ ]

This field is required.

Supervisor Title ★

[ ]

This field is required.

Supervisor Name ★

[ ]

This field is required.

Position Management Module

Action Number – This will populate once the Action is routed to the Approver.

Initiator – Names of employees within your College/Division/Department who have access to the position.

Will you be recruiting once the position is approved? - Select 'Yes' or 'No' if recruitment will follow the position action. This is a required field.

Type of SHRA Action – The type of Action must be selected from the options. For NEW positions, select New Position.

Basis for Request - Explains why the position is being entered. Use this field to explain the position's new permanent or temporary duties, to communicate your business need to establish a brand new position, or to include any additional information pertinent to the request. If the position is being compared to another, indicate the position number of the peer position. This is a required field.

Proposed Effective Date – Enter in the proposed effective date, or the 1st of the month the position will be created. This is a required field.

Incumbent Name – If the position is filled, include the name of the employee. If the employee has resigned, this field may be left blank.

Incumbent Employee ID – If the position is field, include the employee ID of the employee. If the employee has resigned, this field may be left blank.

Supervisor Position Number – Include supervisor position number. This is a required field.

Supervisor Title – Include supervisor position title. This is a required field.

Supervisor name – Include supervisor name. This is a required field.

Position Management Module

General Information

Department ID   195001 - Dept of Clinical Sciences

* **Position Number**
This field is required.

Enter the Position Number if Established Prior to November 1, 2011. For a New Position, type "New".

Appointment   [Please select ▾]

FTE   [   ]
#.##

Time Limited?   ☐

Time-Limited Appointment Length   [   ]
(Ex: 6 months, 1 year, 2 years 3 years. SHRA positions can be no longer than 3 years)

This field cannot be left blank if the "Time Limited" field above is checked.

Classification

Working Title   [Administrative Support Associate]

Current Classification Title   [   ]

Current Band Level   [Please select ▾]
This field will populate upon completion of HR review.

* **Proposed Classification Title**
This field is required.

*SPA Classification titles can be found here: http://www.ncsu.edu/human_resources/classcomp/jobtitles.php

* **Proposed Band Level**   [Please select ▾]
This field is required.

Endorsed Classification Title
This field will populate upon completion of HR review.

Endorsed Band Level   [Please select ▾]

Funding Source

* **Is this position partially or fully funded on ARRA stimulus monies?**   [▾]
This field is required.

* **State Appropriated Funding / Non-State Appropriated Funding**   [Please select ▾]
This field is required.

Funding Source

* **Is this position partially or fully funded on ARRA stimulus monies?**   [▾]
This field is required.

* **State Appropriated Funding / Non-State Appropriated Funding**   [Please select ▾]
This field is required.

Funding Source Details
At least one funding source is required. If multiple funding sources, the percentages must total 100%.

Click on **Add Funding Source Details Entry** to provide the funding information. Continue to click as needed for adding multiple funding sources.

[Add Funding Source Details Entry]

Position Management Module

General Information

Department ID – Department ID will populate.

Position Number – Verify position number is accurate. This is a required field.

Appointment – Select appointment length from the drop-down menu.

FTE – Enter the FTE of the position (full time, 1.0 FTE positions are 2080 hours per fiscal year). If the position works less than 40 hours per week 52 weeks per year, calculate the FTE percentage by multiplying the number of hours per week (example: 32 hours/week) by the number of weeks worked per year (example: 52 weeks/year) and divide by 2080 (32*52 = 1664/2080 = 80% or .8 FTE)

Time Limited? – If the position is time-limited, check the indicator box (SHRA positions only).

Time-Limited Appointment Length – Enter time-limited appointment length. (Ex: 6 months, 1 year, 2 years, 3 years. SHRA positions can be no longer than 3 years)

Classification

Working Title – This will populate from the previous screen.

Current Classification Title – If the request is to change the Title or Level of the position, enter the current title (and band level if SHRA, i.e. Contributing, Journey or Advanced), otherwise, leave blank.

Current Band Level – Select the current band level if existing position.

Proposed Classification Title – Enter the proposed Classification Title. This is a required field. SHRA Career Bands/Classifications can be found here: SHRA Career Bands

Proposed Band Level – Enter the proposed band level. This is a required field.

Endorsed Classification Title – This field will populate upon completion of HR review.

Endorsed Band Level – This field will populate upon completion of HR review.

Funding Source

Is this position partially or fully funded on ARRA stimulus monies? - Select "Yes"/"No" from the drop down if the position is partially of fully funded on ARRA stimulus monies. This is a required field.

State Appropriated Funding/Non-State Appropriated Funding - Select if the position is "State Appropriated"/"Non-State Appropriated" or "Both." This is a required field.

Funding Source Details

The Funding Source Details section is required. At minimum, the Project Code and Percentage of Funding on that Project Code must be completed (until the total equals 100%). Click "Add Funding Source Details Entry" to add sources.

Salary Information

Budget Amount/Current
Annualized Salary

If the position is vacant, provide the proposed amount in the budget.

If the position is filled, provide the current salary for the incumbent.

SPA Salary Reference Rates:http://www.ncsu.edu/human_resources/classcomp/pdf/cbRates_alpha.pdf#zoom=150

Salary Adjustment Request

Not applicable for new or vacant positions.

Type of Salary
Adjustment

Please select ▼

Proposed Annualized
Salary

Endorsed Annualized
Salary

This field will populate upon completion of HR review.

Required Details for Temporary Salary Adjustments

Not applicable for new or vacant positions

Proposed Begin Date for
Temporary Increase:

Proposed End Date for
Temporary Increase:

Salary Information

Budget Amount/Current Annualized Salary - Provide the proposed amount in the budget.

Salary Adjustment Request - Not applicable for new or vacant positions

Required Details for Temporary Salary Adjustments – Not applicable for new or vacant positions

Position Management Module

Change Request Information

For EHRA salary adjustment only – complete the Change Request information fields. If EHRA Action does not include a salary adjustment, skip this section.

Change Request Information

Complete the below fields for actions that include a salary adjustment. If this action does not impact salary, leave the fields blank and proceed to the Funding Source section below.

Proposed Salary	
Percent Change Over Current Salary	
Dollar Increase	
Salary as of June 30 of previous fiscal year	
Percent change over June 30 previous fiscal year salary	
Increase amount over June 30 previous fiscal year salary	

Position Management Module

Position Information

Primary Function of Organizational Unit ⋆

[ ]

This field is required.
The information in the box above will show in the posting.

General Scope of Duties ⋆

[ ]

This field is required.
The information in the box above will show in the posting.

Description of Competencies and Related Job Duties

To enter the position description details, please click the "Add Description of Competencies and Related Job Duties Entry" button. The total percentage of time allocated for all the tasks and responsibilities must equal 100%. Note: A minimum of two competencies are required.

*SPA Classification titles can be found here: http://www.ncsu.edu/human_resources/classcomp/jobtitles.php.

[Add Description of Competencies and Related Job Duties Entry]

Other Duties and Responsibilities

Other Work/Responsibilities

[ ]

The information in the box above will show in the posting.

Job City & State [ ]

Format: City, State

Supervisory

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:

Number of Permanent Employees this Position Supervises [ ]

Primary Function of Organization Unit - Use this space to describe the organization unit and why it is a great place to work.

General Scope of Duties - Enter a summary of the position responsibilities. This is the Major Function section from the position description. Use this space to describe the job, but also to "sell" the job to potential candidates. If you are cloning a position, this will default from the cloned position and can be edited as appropriate.

Description of Competencies and Related Job Duties - The responsibilities are the job duties/tasks performed by the position. At least 3 responsibility entries are required. The total percentage of time for all responsibilities should equal 100%. You will also need to select at least one Marginal responsibility. Select **Add Responsibilities Entry** to add a new entry. If you need to remove an entry, check the "Remove Entry?" box. Once you progress the next page it will be removed.

Other Work/Responsibilities - Enter any additional information related to the position not captured above; this information will transfer over to the posting

Job City & State - Enter City and State position will be located

Supervisory Number of Permanent Employee this Position Supervises - Enter the number of permanent employees the position will supervise.

Position Management Module

Requirements and Preferences

* Identify if the Position is Mandatory/Essential/Key	[Please select ▼] This field is required. *Description of options: http://www.ncsu.edu/human_resources/hrim/Mandatory-Essential_Key-SelectingFieldValue.php* *The information in the box above will show in the posting.*
* Work Schedule	[ ] This field is required. *The information in the box above will show in the posting.*
* Does the regular and recurring schedule of this position result in the employee working more than ½ of their hours between 4 pm and 8 am? (Meal periods do not count).	[▼] This field is required.
Minimum Experience/Education	*The information in the box above will show in the posting.* *This field will populate upon completion of HR review*
* Preferred Minimum Experience/Education	[ ] This field is required. *Please type ""N/A"" if specific information is not applicable.* *The information in the box above will show in the posting.*
* Knowledge, skills, and abilities necessary to perform job duties	[ ] This field is required. *Please type "N/A" if specific information is not applicable.* *The information in the box above will show in the posting.*
* Required License or Certification	[ ] This field is required. *Please type ""N/A"" if specific information is not applicable.* *The information in the box above will show in the posting.*
* Valid NC Driver's License required?	[▼] This field is required. *The information in the box above will show in the posting.*
* Commercial Driver's License Required?	[▼] This field is required. *The information in the box above will show in the posting.*
* Physical Required?	[▼] This field is required.
List any other medical/drug tests required	[ ]

Position Management Module

Identify if the Position is Mandatory/Essential/Key – Select from the drop-down menu if position is Mandatory/Essential or Key. This is a required field.

Work Schedule – Enter work schedule and complete with as much detail as possible. This is a required field.

Does the regular and recurring schedule of this position result in the employee working more than ½ of their hours between 4 pm and 8 am? (Meal periods do not count) – Select 'Yes' or 'No' from the drop-down menu if this applies. This is a required field.

Minimum Education/Experience –
For SHRA positions, this will default/populate based on the selected classification. Requirements can be found here based on the classification: SHRA Career Bands
For EHRA positions – Enter in the proposed education and experience. This is a required field.

Preferred Minimum Experience/Education – Enter the preferred minimum experience/education. This is a required field.

Knowledge, skills, and abilities necessary to perform job duties – Enter KSA's needed to perform the job duties (ex: Excellent written and oral communication skills, Ability to provide advice and counsel). This is a required field.

Required License or Certification – Enter any required licenses or certification. Type "N/A" if none. This is a required field.

Valid NC Driver's License required? Select "Yes" or "No" if a valid NC Driver's License is required to perform the primary function of the job. This is a required field.

Commercial Driver's License Required? Select "Yes" or "No" if a valid NC Commercial Driver's License is required to perform the primary function of the job. This is a required field.

Physical Required? Select "Yes" or "No" if a physical is required. This is a required field.

List any other medical/drug tests required - Complete this field if there are any other medical/drug tests based on the requirements of the job.

Position Management Module

Position Documents   Save   << Prev   Next >>

"To add a document to the position, hover over the blue **Action** text link to the right of the document name.

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

Documents can be uploaded by browsing for the document or a document can be written or previously selected. Document types that are supported as attachment include .doc, .docx, .pdf, .rtf, .rtx, .txt, .tiff, .tif, .jpeg, .jpe, .jpg., png, .xls and .xlsx. All documents uploaded will be converted to .pdf for security.

Click Save to update conversion status."
PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
* Organizational Chart (Required)			Actions ⌄
* ADA Checklist (Required) - Form found at https://hr.ncsu.edu/wp-content/uploads/2016/08/adachk.pdf			Actions ⌄
Other Document 1			Actions ⌄

Position Documents:

A current Organizational Chart and ADAAA Checklist are required when creating a new SHRA and EHRA position. These are the only two required documents. However, if there is additional documentation that is relative to the position, there are "Other Documents" options for uploading.

Position Management Module

Recruitment Details

Would you like University Temporary Services to contact you for temporary staffing assistance?

[▼]

For more information, visit: http://www.ncsu.edu/human_resources/uts/.

Anticipated Hiring Range

[   ]

The information in the box above will show in the posting.

Internal Transfer Only

[▼]

If you anticipate multiple hires from this search, please indicate how many

[   ]

Recruitment Dates

Proposed Start Date

[   ]

Advertising

Post on Monster?

[▼]

Post on InsideHigherEd.com?

[▼]

Post to Higher Ed Jobs?

[No ▼]

Places you would like to recruit

[   ]

All advertisements must contain the equal opportunity/affirmative action, and sexual orientation clauses.

Applicant Information

Special Instructions

[   ]

Position Management Module

Recruitment Details: *If there is NOT a recruitment following the creating of the position or Action, you may skip this section and progress to the next screen.*

Would you like University Temporary Services to contact you for temporary staffing assistance? - University Temporary Services (UTS) can assist you in hiring a temporary employee during the recruitment period. Select "Yes" or "No" in the drop-down menu if you would like to be contacted. More information can be found: University Temporary Services

Anticipated Hiring Range –Enter an exact amount or range, or "Commensurate with Experience."

Internal Transfer Only – Select "Yes" or "No" if the hiring manager wishes to only consider internal NCSU employees (Permanent SHRA, EHRA and time-limited only). Contact your Talent Consultant for further guidance.

If you anticipate multiple hires from this search, please indicate how many – Enter the number of hires if there are multiple hires for this position. **Please note: The position description and duties must be identical for each hire.**

Recruitment Dates:

Proposed State Date – Enter the proposed state date

Advertising:

Post on Monster? – Select "Yes" or "No" if you would like your position to be posted. This is a free service.

Post on InsideHigherEd.com? – Select "Yes" or "No" if you would like your position to be posted. This is a free service.

Post to Higher Ed Jobs? – Select "Yes" or "No" if you would like your position to be posted. This is a free service.

Places you would like to recruit – Optional: You may choose to advertise in other publications. Upload a draft of the advertisement in the "Other Documents" section in "Position Documents" and UHR can provide a quote.

Application Information:

Special Instructions - The department can provide special instructions to applicants. For ex: "Please attached a resume/CV, cover letter and contact information for three professional references."

Supplemental Questions: *If there is NOT a recruitment following the creating of the position or Action, you may skip this section and progress to the next screen.*

In PeopleAdmin, you can add your own supplemental questions to your position. These are questions that you want your applicants to answer during their application process. These questions can take many different forms (open-ended or multiple choice) and can be used as a screening tool when reviewing applications. Instructions for how to add or create supplemental questions are located within the page.

Applicant Documents: *If there is NOT a recruitment following the creating of the position or Action, you may skip this section and progress to the next screen.*

This is where you decide what documents you want your applicants to attach in addition to their application. The most common attachments are Resume (or CV), Cover Letter and Contact information for references. Applicant documents can be included in the application process by selecting **Optional** to make the documents optional and **Required** to make the document(s) mandatory to complete the application process.

Position Management Module

Waivers (EHRA Positions Only)

Search Waiver Requests– If you will be requesting a search waiver (to appoint an individual to this position without conducting a search), contact the Office for Institutional Equity and Diversity (OIED) / (919) 515-3148 to receive an endorsement. Once approved, they will provide you with an OIED Approval Code to enter in the Action.

Waiver

^{ABC} Check spelling

Waiver Details

OIED Employment and Hiring
OIED Staff Directory

OIED Approval Code [   ]

Before Submitting a Waiver Request OIED should be contacted and they will provide you with an approval code to enter here.

Name of Waived
Employee [   ]

Nature of Waiver
Appointment

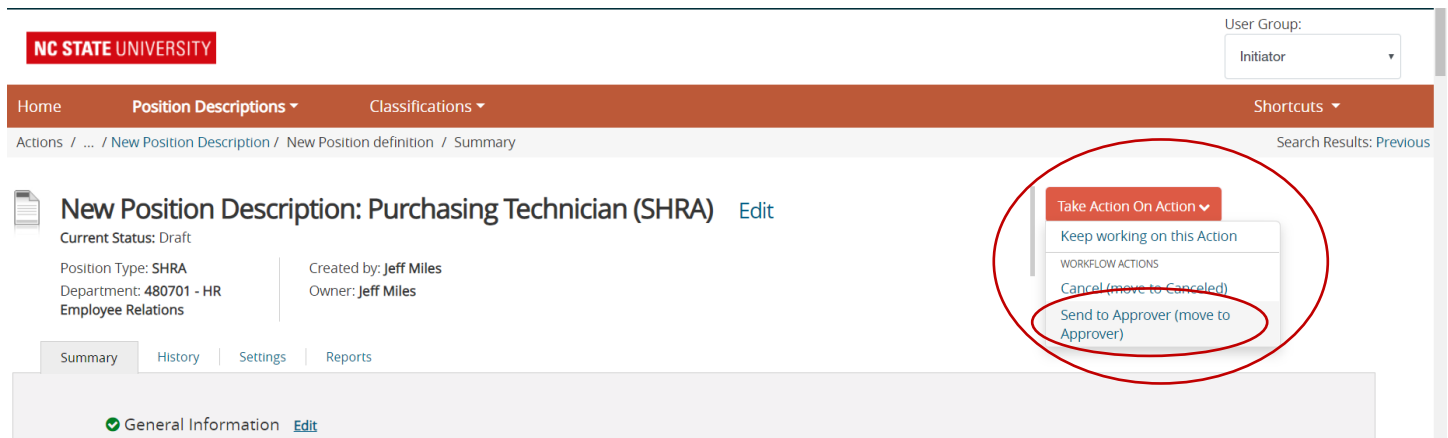| Please select	▾
Please select	
Distinguished or Named Professor	
Promotion	
Dual Career/Spousal Hire Appointment (Reference position # of spousal hire in Basis for Request on the General Information page)	
Person named in grant	
Transfer	
Other (explain in Basis for Request on the General Information page)	
N/A - Not Applicable	

Position Management Module

<u>Routing / Take Action Summary:</u>

When you reach this screen, your position is completed and you are now ready to route for approval.

The first step is to ensure that all sections have a green check ✅ mark.

An orange exclamation point ⚠️ that means that there is a required field that has not been completed. Select the blue **Edit** link for that section to go back and make the required updates. Select **Save** or **Next** to save and continue. After saving, you can move to the Action Summary to review the final information for additional errors.

Once all the sections have a ✅, you are ready to route this. Select the "**Take Action On Action**" button in the upper right. You will receive multiple options on what action to perform. Select "Send to Approver" and select the appropriate approver from the drop-down menu to route to.

EXTREMELY IMPORTANT- You have the option to add comments. These comments are saved with the position and **<u>cannot be erased.</u> These comments will be viewable by anyone who accesses the posting and are an official part of the recruitment file.**

Finally, select **Submit** to finish routing the position. You should see "Action was successfully transitioned" (below) when the position has been routed to your selected approver. Once you submit your completed position description, a unique Action Number will be assigned to your action. This number will be found at the top of the Position Details page (ex: AC123456SP or EP). Record this number for future use

Position Management Module

Take Action On Action ⌄

🖶 Print Preview

🔖 Add to Watch List

If you want to watch this position and access it easily later, add it to your watch list to be able to view it quickly from your home screen.

Congratulations, you have successfully completed routing a position for recruitment. A Classification & Compensation Consultant will review your Action and send you a confirmation e-mail once it is complete. The position will then be routed to a Talent Acquisition Consultant (TAC) for posting. You will also receive a confirmation email from your TAC at the time the job advertisement is posted and accessible to applicants.

For additional information, please contact your Classification & Compensation Consultant.