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Objective:

The objective of this manual is to instruct authorized users of the online Position Description Module on how to properly generate and submit the following:

- Position Descriptions (Establishments and Updates)
- Salary Administrative Actions (Requests for Reclassification and Special Pay Increases)

Intended Audience:

This guide is intended for use by authorized users of Online Position Description Module (Position Description Point of Contacts, Dean/Director/Department Heads, Vice Presidents, Divisional & University Budget Staff, and Human Resources).

Pre-requisites:

Most users of this manual currently are role users in the recruitment / new hire process and should already be familiar with the general functionality of the system.

In order to follow the directions in this manual, one must have the following pre-requisites:

- Computer with internet access;
- Approved account within OASys and permission to appropriate department.
SECTION 1: INTRODUCTION

1.2 Login

In order to access the Online Position Description Module you must be at a computer with internet access. OASys is accessible 24-hours-a-day, 7-days-a-week, from any internet enabled computer.

1. Open your internet browser, such as Internet Explorer.
2. Go to the following web address: www.unfjobs.org/hr
3. Type your user name and password into the appropriate fields.
4. Click the Login button.

OR

1. Log in to UNF myWings.
2. Under My Applications select “OASYS – Hiring and PD Module.”
3. Type your user name and password into the appropriate fields.
4. Click the Login button.
SECTION 1: INTRODUCTION

1.3 Navigation

IMPORTANT: Do not use your internet browser’s back, forward or refresh buttons. Doing so may cause unexpected results, including the loss of data.

1.4 Sidebar Options

- The Sidebar contains a list of links to access both the OASys Recruitment and Position Description Modules. The illustration below shows those specific to the Position Description Module.

![Sidebar Illustration]

Welcome to OASys at UNF

Online Application System at UNF

To perform actions, please choose from the links at left.
SECTION 1: INTRODUCTION

1.5 Landing Page

- Click Begin New Action to view a list of Action Types.
<table>
<thead>
<tr>
<th>PD Module User Type*</th>
<th>Permissions / Functionality</th>
</tr>
</thead>
</table>
| PDPOC (Position Description Point of Contact) | • Establish, update, reclassify or request special pay increase for Dean/Director/Department Head approval  
• Submit actions for approval  
• View all pending and historical actions within the department |
| Dean/Director/Department Head | • Establish, update, reclassify or request special pay increase for VP approval  
• Submit actions for approval  
• View all pending and historical actions within the department |
| VP | • Establish, update, reclassify or request special pay increase for HR approval  
• Submit actions for approval  
• View all pending and historical actions within the department |
| Budget (Division Budget and University Budget) | • Review requests for reclassifications and special pay increases  
• Submit actions for approval |
| Personal Scope | • View a position description and associated actions for a specific position(s) outside of your department.  
• Receive informational email notifications when an action is taken on the specific position(s). |

*The Recruitment Module has different User Types and you will be required to change your User Type when switching between Modules. See section 2.2 for information on “selecting your user type.”
SECTION 2: ADMINISTRATION

2.2 Select Your User Type

- Select **Change User Type** to toggle between the Recruitment Module and the Position Description Module.
SECTION 2: ADMINISTRATION

2.3 Request to Add, Update or Inactivate Users Access

Adding a User
- Go to the Office of Human Resources webpage at www.unf.edu
- On the Human Resources webpage, left side bar, click “Employment”
- In the middle of the page, click the “Hiring Department Resources” link
- Under the section Online Application System (OASys), click the “Online PD Module” link
- Select “Create User Account”, complete the on-line form, select “Submit for Approval”
- Your completed form will be submitted to HR for approval and you will be notified by HR if the account has been approved.

Updating a User
- If you need to update a User Account, please contact HR for assistance.

Inactivate a User
- The Office of Human Resources reserves the right to inactivate user accounts when an employee employment status changes i.e. transfer, resignation/termination or when it is deemed no longer appropriate for an employee to have access based on their role.
SECTION 3: CLASSIFICATION SPECIFICATIONS

Search Job Specifications

**Step 1:** Select the **Search Job Specifications** link on the left sidebar to search for a job specification.

**Step 2:** From the **Search Job Specifications** screen, you can search by Class Code, Job Title or Job Type (Administrative & Professional or Support). After entering your search criteria, select **Search**.
SECTION 3: CLASSIFICATION SPECIFICATIONS

Search Job Specifications

Step 3: From the View Classification screen, select View Summary

The View Title Summary screen will display the job specifications for the position.

![View Title Summary Table]

<table>
<thead>
<tr>
<th>Title Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class Code</td>
</tr>
<tr>
<td>Job Title</td>
</tr>
<tr>
<td>Job Type</td>
</tr>
<tr>
<td>FLSA Designation</td>
</tr>
<tr>
<td>Pay Grade</td>
</tr>
<tr>
<td>Salary Range Minimum</td>
</tr>
<tr>
<td>EEO Category</td>
</tr>
<tr>
<td>CBU Code</td>
</tr>
<tr>
<td>Nature of Work</td>
</tr>
<tr>
<td>Typical Responsibilities</td>
</tr>
<tr>
<td>Basic Qualifications</td>
</tr>
</tbody>
</table>
**SECTION 4: POSITION DESCRIPTIONS**

4.1 Search for a Position Description

**Step 1: Search for a Position Description**
- Select the **Search Position Descriptions** link from the left sidebar to search for a finalized and APPROVED position description.

**Step 2: Search for a Position Description**
- You can search by Position Number, Job Title, or Class Code.
- Enter your search criteria, and mark one or more of the **Status Boxes**.
- Select **Search**.
SECTION 4: POSITION DESCRIPTIONS

4.1 Search for a Position Description

**Step 3: View a Position Description**
- Your search results will appear on the View Position Descriptions screen.
- Select View Summary under the job title to display the Position Description.
SECTION 4: POSITION DESCRIPTIONS

4.2 Print a Position Description

**Step 1: Print a Position Description**
- Follow steps in section 9.1 to view a position description.
- With the position description on your screen, select **CTRL+P** on your keyboard and either print the position description or save it as a “pdf” document.
- Please note that if you want to save the position description as a pdf document, you may need to select the Printer named **doPDF v7**.

![Print Screen Screenshot](image-url)

**University of North Florida Position Description**

This Position Description is used to describe the duties, scope of responsibilities and qualifications required of the position. This information is the basis for determining title and compensation, and is also used for recruitment, selection and performance evaluations. To achieve these purposes, managers and supervisors should ensure comprehensive and accurate position descriptions are documented for their respective positions.

<table>
<thead>
<tr>
<th><strong>Job Specification</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Class Code</strong></td>
</tr>
<tr>
<td><strong>Job Title</strong></td>
</tr>
<tr>
<td><strong>Job Type</strong></td>
</tr>
<tr>
<td><strong>FLSA Designation</strong></td>
</tr>
<tr>
<td><strong>Pay Grade</strong></td>
</tr>
<tr>
<td><strong>Salary Range Minimum</strong></td>
</tr>
<tr>
<td><strong>EEO Category</strong></td>
</tr>
<tr>
<td><strong>CBU Code</strong></td>
</tr>
</tbody>
</table>

**Nature of Work**

This is work providing custodial services.

**Typical Responsibilities**

- Sweeps, mops, scrubs, washes and buffs floors.
- Dusts and cleans offices, laboratories, and/or other facilities.
- Washes windows.
- Cleans and sanitizes bathroom facilities.
- Sweeps and cleans walkways.
- Meters simple repairs to buildings and cleaning equipment, and reports more extensive damage.
- May replace light bulbs.
- May dispose of contaminated trash and waste materials.

**Basic Qualifications**

- Completion of ninth (9th) grade required; HS Diploma preferred.

**Position Information**

<table>
<thead>
<tr>
<th><strong>Position Number</strong></th>
<th>313190</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full/Part-Time</strong></td>
<td>Full-Time</td>
</tr>
<tr>
<td><strong>Working Hours</strong></td>
<td>7:00 AM - 4:00 PM</td>
</tr>
<tr>
<td><strong>Division</strong></td>
<td>Administration and Finance</td>
</tr>
</tbody>
</table>
**SECTION 5: UPDATE A POSITION**

**Update a Position**

Use this Action to make routine updates to a position description. Examples of routine updates include change in work schedule or minor changes to job duties. Complete the following steps to initiate the request and submit it to the next level for approval.

**Step 1:** Select the **Begin New Action** link on the left sidebar.

**Step 2:** From the **Choose Action to Begin** screen, locate **Update a Position** and select **Start Action**.
**SECTION 5: UPDATE A POSITION**

Update a Position

**Step 3:** From the **Update a Position** screen, search for the position you want to update by entering a Position Number, Job Title or Class Code; then select **Search**.

**Step 4:** Your search results will appear in a new window. Select **Start Action** under the title of the position you want to update.
SECTION 5: UPDATE A POSITION

Update a Position

Step 5: Current Job Description

- On this screen you can view the current position description.
- When you are ready to proceed, select **Continue to Next Page** at bottom of screen.
Step 6: Proposed Job Details

- On this screen you will begin to make updates to the position description.
- You must complete any required fields (noted with an asterisk) to be able to proceed to the next screen.
- When you are finished, select **Continue to Next Page** at bottom of screen.

The Request Number field will be a unique number that will automatically generate after you start an action.
SECTION 5: UPDATE A POSITION

Update a Position

Step 7: Physical Requirements and Work Environment

- On this screen update any responses about the physical requirements required to perform the Essential job functions.
- There is also a field to describe unusual working conditions, if applicable.
- When you are finished, select Continue to Next Page at bottom of screen.
SECTION 5: UPDATE A POSITION

Update a Position

Step 8: Documents

- On this screen attach any documents that are relevant to the updates you are requesting.
- Select the Attach link to attach up to 3 documents.
- When you are finished, select Continue to Next Page at bottom of screen.
SECTION 5: UPDATE A POSITION

Update a Position

Step 9: Justification for Action

- On this screen provide the reason you are updating the position description and describe the changes you made to the position description.
- When you are finished, select Continue to Next Page at bottom of screen.
SECTION 5: UPDATE A POSITION

Update a Position

Step 10: Action History Tab

- On this screen provide any additional information that you want to be saved as a part of the action.
- Be sure to select Add Notes and then Confirm to make sure your information is saved for the next user to see.
- When you are finished, select Continue to Next Page at bottom of screen.
Step 11: View Update a Position Summary

- From the **View Update a Position Summary** screen, you will have various **Action Statuses** available to you, depending on where the position description is in the workflow.
- In the example below, the PDPOC has just initiated the action, and has the following options:
  - **Save Action Without Submitting**: use this option if the updated position description is not yet ready to submit for approval and you want to be able to go back to the action at a later time.
  - **Submit to Dean/Director/Department Head**: use this option if you are ready to send the request to the next level for approval. The user will be notified by email of a pending action awaiting their review and approval.

![View Update a Position Summary](image)
SECTION 5: UPDATE A POSITION

Update a Position

Step 12: Notification Email of Approval

- After the request to update a position description has completed the approval process, users will receive an auto-generated email notification from Human Resources (see sample below).
- To find out the status of your action at any time during the approval process, refer to Section 8, Search Actions.

SAMPLE APPROVAL EMAIL

From: OHR-Opsys@unf.edu
To: 
Cc: 
Subject: Update a Position - Position Number 313111, Custodial Worker is APPROVED

A request to Update a Position Description - 313111 Custodial Worker, Request Number 000005 has been approved by HR.

Thanks, UNF HR
SECTION 6: RECLASSIFY A POSITION

Reclassify a Position

Use this Action to request the reclassification of a position. Complete the following steps to initiate the request and submit it to the next level for approval.

**Step 1:** Select the **Begin New Action** link on the left sidebar.

**Step 2:** From the **Choose Action to Begin** screen, locate **Reclassify a Position** and select **Start Action**.
SECTION 6: RECLASSIFY A POSITION

Reclassify a Position

Step 3: From the Reclassify a Position screen, select the position you want to reclassify by entering the Position Number, Job Title, or Class Code; then select Search.

Step 4: From the Reclassify a Position screen, select Start Action under the Job Title you want to reclassify.
SECTION 6: RECLASSIFY A POSITION

Reclassify a Position

Step 5: Current Job Description

- On this screen you can view the current position description.
- When you are finished, select **Continue to Next Page** at bottom of screen.
SECTION 6: RECLASSIFY A POSITION

Reclassify a Position

Step 6: Proposed Title

- On this screen you will see the job specifications for the current position.
- Select Change Job Specification to select the job specifications for the position that you are requesting the position be reclassified to.

![Reclassify a Position Screen](image-url)
**SECTION 6: RECLASSIFY A POSITION**

Reclassify a Position

**Step 6: Proposed Title (continued)**

- On this screen enter the class code or job title that you are requesting the current position be reclassified to.
- Select Search.
**SECTION 6: RECLASSIFY A POSITION**

Reclassify a Position

**Step 6: Proposed Title (continued)**

- On this screen you will see the job specifications for the title you are requesting the current position be reclassified to.
- Review the job specifications to make sure this is the correct position for your request.
- If you are ready to proceed, select **Continue to Next Page** at bottom of screen.
SECTION 6: RECLASSIFY A POSITION

Reclassify a Position

Step 7: Proposed Job Details

- On this screen you will begin to provide the information required to reclassify the position.
- You must complete any required fields (noted with an asterisk) to be able to proceed to the next screen.
- When you are finished, select Continue to Next Page at bottom of screen.

The Request Number field will be a unique number that will automatically generate after you start an action.

IMPORTANT!
Even though you have selected a new position for the reclassification request, not all fields automatically update with the new position details. You must carefully review all fields on this screen and make updates as needed to reflect the proposed position.
**SECTION 6: RECLASSIFY A POSITION**

Reclassify a Position

**Step 8: Physical Requirements and Work Environment**
- On this screen answer all of the required questions about the physical requirements required by the proposed position to perform the Essential job functions.
- There is also a field to describe unusual working conditions, if applicable.
- When you are finished, select **Continue to Next Page** at bottom of screen.
SECTION 6: RECLASSIFY A POSITION

Reclassify a Position

Step 9: Documents

- On this screen, attach any documents that are relevant to the reclassification of the position.
- Select the Attach link to attach up to 3 documents.
- When you are finished, select Continue to Next Page at bottom of screen.
SECTION 6: RECLASSIFY A POSITION

Reclassify a Position

Step 10: Justification for Action

- On this screen complete all fields, including proposed compensation if applicable.
- When you are finished, select Continue to Next Page at bottom of screen.

The following fields will not pre-populate and you must type in the correct information:
- Employee Name
- N-number
- New Position Title
- New Class Code

Complete all other Required fields.
SECTION 6: RECLASSIFY A POSITION

Reclassify a Position

Step 11: Action History

- On this screen provide any additional information that you want to be saved as a part of the action.
- Be sure to select Add Notes and then Confirm to make sure your information is saved for the next user to see.
- When you are finished, select Continue to Next Page at bottom of screen.
SECTION 6: RECLASSIFY A POSITION

Reclassify a Position

Step 12: View Reclassify a Position Summary

- From the View Reclassify a Position Summary screen, you will have various Action Statuses available to you, depending on where the position description is in the workflow.
- In the example below, the PDPOC has just initiated the action, and has the following options:
  - Save Action Without Submitting: use this option if the request for reclassification is not yet ready to submit for approval and you want to be able to go back to the action at a later time.
  - Submit to Dean/Director/Department Head: use this option if you are ready to send the request to the next level for approval. The user will be notified by email of a pending action awaiting their review and approval.
Reclassify a Position

**Step 13: Notification Email of Approval**

- After the request to reclassify a position description has completed the approval process, users will receive an auto-generated email notification from Human Resources (see sample below).
- To find out the status of your action at any time during the approval process, refer to Section 8, Search Actions.

**SAMPLE APPROVAL EMAIL**

```
A request to Reclassify position number 313111 from Custodial Worker to Custodial Supervisor, Request Number 000005 has been approved by HR.

If the position is vacant, please submit your request for approval to Recruit on a Vacant Line.

If the position is filled, please attach this email as supporting documentation to the Personnel Action Form (PAF).

JUSTIFICATION FOR RECLASSIFICATION ACTION:

- Request Number: 000005
- Position Number: 313111
- Employee Name: Calvin Jones
- N-number: N00088888

Budget Office Comments:
Additional Rate will be funded out of Auxiliary Overhead.

New Position Title: Custodial Supervisor
New Class Code: 0528
Approved Annual Rate: $23,000.00
Effective Date: 02/01/2014

Thanks, UNF HR
```
SECTION 7: REQUEST A SPECIAL PAY INCREASE

Request a Special Pay increase

Use this Action to request a special pay increase. Complete the following steps to initiate the request and submit it to the next level for approval.

**Step 1:** Select the **Begin New Action** link on the left sidebar.

**Step 2:** From the **Choose Action to Begin** screen, locate **Request for Special Pay Increase** and select **Start Action**.
SECTION 7: REQUEST A SPECIAL PAY INCREASE

Request a Special Pay Increase

Step 3: On the Request for Special Pay Increase Screen, search for the position you want to request a special pay increase for by entering a Position Number, Job Title, or Class Code; then select Search.

Step 4: Your search results will appear in a new window. Select Start Action to begin the process of requesting a special pay increase for this position.
SECTION 7: REQUEST A SPECIAL PAY INCREASE

Request a Special Pay increase

Step 5: Current Job Description

- On this screen you can view the current position description.
- When you are ready to proceed, select Continue to Next Page at bottom of screen.
**SECTION 7: REQUEST A SPECIAL PAY INCREASE**

**Request a Special Pay Increase**

**Step 6: Proposed Job Details**
- On this screen you will begin to provide the information required to update the position description in connection with your request for a special pay increase.
- You must complete all required fields (noted with an asterisk) to be able to proceed to the next screen.
- When you are finished, select **Continue to Next Page** at bottom of screen.

- **Required Field**
  - The Request Number field is a unique number that will automatically generate after you start an action.

- **For Support positions, continue to indicate the percent of time spent on each function. Please place the % at the beginning of each essential function.**

- **Do NOT edit or remove the last statement in the Essential Functions regarding campus emergencies.**
SECTION 7: REQUEST A SPECIAL PAY INCREASE

Request a Special Pay increase

Step 6: Proposed Job Details (continued)

- Scroll down through the entire screen and continue to make updates as they relate to your request for a special pay increase.
- When you are finished, select **Continue to Next Page** at bottom of screen.

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**This hyperlink provides options that describe the type of supervision the position receives. You can Copy the appropriate level and then Paste it into the field.**

**This hyperlink provides additional instruction on what information to put in this field.**

**ALL positions require a police background check.**

The four questions in this section relate to **additional** background checks or other position requirements.

Read each question and select “Yes” if it is a requirement for the position, or “No” if it is not a requirement.
**SECTION 7: REQUEST A SPECIAL PAY INCREASE**

Request a Special Pay increase

**Step 7: Physical Requirements and Work Environment**
- On this screen update any responses about the physical requirements required to perform the Essential job functions.
- There is also a field to describe unusual working conditions, if applicable.
- When you are finished, select **Continue to Next Page** at bottom of screen.
Section 7: Request a Special Pay Increase

Step 8: Documents
- On this screen you will be able to attach any documents that are relevant to the establishment of the position description.
- Select the Attach link to attach up to 3 documents.
- When you are finished, select Continue to Next Page at bottom of screen.
**SECTION 7: REQUEST A SPECIAL PAY INCREASE**

**Request a Special Pay Increase**

**Step 9: Justification for Action**
- On this screen complete all fields and the proposed compensation details.
- When you are finished, select **Continue to Next Page** at bottom of screen.

The following fields **will not pre-populate** and you must type in the correct information:
- Employee Name
- N-number

Complete all other Required fields.

“Other” possible reasons include:
- Budget Limitations
- Internal Inequity
- Market Retention
- Market Salary Compression
SECTION 7: REQUEST A SPECIAL PAY INCREASE

Request a Special Pay Increase

Step 10: Action History

- On this screen provide any additional information that you want to be saved as a part of the action.
- Be sure to select Add Notes and then Confirm to make sure your information is saved for the next user to see.
- When you are finished, select Continue to Next Page at bottom of screen.
SECTION 7: REQUEST A SPECIAL PAY INCREASE

Request a Special Pay increase

**Step 11:** Notification Email of Approval

- After the request for special pay increase has completed the approval process, users will receive an auto-generated email notification from Human Resources (see sample below).
- To find out the status of your action at any time during the approval process, refer to Section 8, Search Actions.

**SAMPLE APPROVAL EMAIL**

From: OHR-Casys@unf.edu
To: 
CC: 
Subject: Request for Special Pay Increase - Position Number 313111 Custodial Supervisor, Request Number 000005 is Approved

A Request for Special Pay Increase for 313111 Custodial Supervisor, Request Number 000005 has been approved by HR.

Please attach this email as supporting documentation to the Personnel Action Form (PAF).

JUSTIFICATION FOR SPECIAL PAY INCREASE ACTION:
Request Number: 000005
Position Number: 313111
Employee Name: Joe Smith
N-number: N00012345
Current Annual Rate: $23,000
Proposed Annual Rate: $24,000
Percent Increase to Annual Rate:
Dollar Amount Increase to Annual Rate: $1,000
Lump sum payment (not to be added to base salary): $
Budget Office Comments:

Approved Annual Rate: $24,000
Effective Date: 11/12/2013

If this Special Pay action is for lump sum payment, you will receive a subsequent email once the direct deposit date for this payment has been scheduled.

Thanks, UNF HR
SECTION 8: ESTABLISH A NEW POSITION

Establish a New Position

Use this Action to establish a new position description.

- **Before** beginning this action, perform a Search Action on the position number (see Section 10.1) to make sure a position description does not already exist.
- **Only** use this action to create a newly budgeted position or to create a position description for a position that has been vacant.

Complete the following steps to initiate the request and submit it to the next level for approval.

**Step 1:** Select the **Begin New Action** link on the left sidebar.

**Step 2:** From the **Choose Action to Begin** screen, locate **Establish a New Position** and select **Start Action**.
SECTION 8: ESTABLISH A NEW POSITION

Establish a New Position

Step 3: Copy Approved Position

- This screen allows you to establish a new position description by copying an existing approved position description.
- This option is only available to you for approved position descriptions within your department.
- To use this feature, enter a Position Number, Job Title and/or Class Code and select Search.

OR

Step 3: Do Not Copy Position
- To create a position that is not based on an existing position, select DO NOT COPY POSITION, CONTINUE TO NEXT PAGE
SECTION 8: ESTABLISH A NEW POSITION

Establish a New Position

Step 4: Proposed Title

- If you selected **Do Not Copy Position**, use the drop-down lists to select by Class Code or Job Title.
- Select **Search**.

Step 4: Proposed Title (continued)

- Click **Select Title and Continue** link under the title you chose as the basis of your new position description.

This section allows you to change your selection and choose a different title, if needed.
SECTION 8: ESTABLISH A NEW POSITION

Establish a New Position

Step 4: Proposed Title (continued)

- Your screen will display the Job Specifications for the title you selected.
- Select **Continue to Next Page** to proceed with this job title as the basis of your new position description.
SECTION 8: ESTABLISH A NEW POSITION

Establish a New Position

Step 5: Proposed Job Details
- On this screen you will begin to provide the information required to create the position description.
- You must complete all required fields (noted with an asterisk) to be able to proceed to the next screen.
- When you are finished, select Continue to Next Page at bottom of screen.

**Out-of-cycle Position Establishments**
If you are establishing a position out-of-cycle, you will need to assign a temporary position number to the position description.
- TBD + Division Code (AA, AF, DA, SA, PO) + a number (1 through 9)
- Examples: TBDAF1, TBDDA3, TBDPO2
**SECTION 8: ESTABLISH A NEW POSITION**

Establish a New Position

**Step 5: Proposed Job Details (continued)**

- Scroll down through the entire screen and continue to provide information to create the new position description.
- When you are finished, select **Continue to Next Page** at bottom of screen.

---

**ALL positions require a police background check.**

The four questions in this section relate to **additional** background checks or other position requirements.

Read each question and select “Yes” if it is a requirement for the position, or “No” if it is not a requirement.
Step 6: Physical Requirements and Work Environment

- On this screen answer all of the required questions about the physical requirements required to perform the Essential job functions.
- There is also a field to describe unusual working conditions, if applicable.
- When you are finished, select **Continue to Next Page** at bottom of screen.
**SECTION 8: ESTABLISH A NEW POSITION**

Establish a New Position

**Step 7: Documents**
- On this screen, attach any documents that are relevant to the establishment of the position description.
- Select the **Attach** link to attach up to 3 documents.
- When you are finished, select **Continue to Next Page** at bottom of screen.
**SECTION 8: ESTABLISH A NEW POSITION**

Establish a New Position

**Step 8: Justification for Action**
- On this screen provide the reason for the request to establish the new position description.
- When you are finished, select **Continue to Next Page** at bottom of screen.
SECTION 8: ESTABLISH A NEW POSITION

Establish a New Position

Step 9: Action History

- On this screen provide any additional information that you want to be saved as a part of the action.
- Be sure to select Add Notes and then Confirm to make sure your information is saved for the next user to see.
- When you are finished, select Continue to Next Page at bottom of screen.
SECTION 8: ESTABLISH A NEW POSITION

Establish a New Position

Step 10:
- From the View Establish a New Position Summary screen, you will have various Action Statuses available to you, depending on where the position description is in the workflow.
- In the example below, the PDPOC has just initiated the action, and has the following options:
  - **Save Action Without Submitting**: use this option if the new position description is not yet ready to submit for approval and you want to be able to go back to the action at a later time.
  - **Submit to Dean/Director/Department Head**: use this option if you are ready to send the request to the next level for approval. The user will be notified by email of a pending action awaiting their review and approval.
**SECTION 8: ESTABLISH A NEW POSITION**

Establish a New Position

**Step 11: Notification Email of Approval**

- After the request to establish a new position description has completed the approval process, users will receive an auto-generated email notification from Human Resources (see sample below).
- To find out the status of your action at any time during the approval process, refer to Section 8, Search Actions.

**SAMPLE APPROVAL EMAIL**

![Sample Approval Email Image](image)

**Note:** The Classification & Compensation webpages have been developed as an additional resource. They contain information that should be helpful as you work to complete the establishment of a new position.
SECTION 9: SAVING YOUR WORK

Saving Your Work

The system will only prompt you to save your work after you have gone through all of the screens within an Action (Establish a New Position, Update a Position Description, Reclassify a Position, or Request a Special Pay Increase). You can also jump to the last screen, Action History tab at any time, as long as you have completed all the required fields on the screen you are currently working on.

**Step 1:** At the bottom of the Action History screen, select Continue to Next Page.

**Step 2:** The next screen will present different Action Statuses, depending on what the action is and where it is in the workflow process. To Save your work, select Save Action Without Submitting.
**SECTION 9: SAVING YOUR WORK**

A Shortcut for Saving Your Work

The **Preview Action** or **View Action Summary** buttons can be found at the bottom of any tab within an action. These buttons are shortcuts to the **Action Status** box which gives you options to:

a. Save your work so that you can return to it later; or

b. Forward the action to the appropriate next step.

**Step 1:** From any tab, select the **Preview Action** at the bottom of the screen.

**Step 2:** The next screen will present different **Action Statuses**, depending on what the action is and where it is in the workflow process. To **Save** your work, select **Save Action Without Submitting**.
**SECTION 10: SEARCH ACTIONS**

**10.1 Search Actions**

The **Search Actions** feature allows you to find out where an action is in the workflow process at any time.

**Step 1:** Select the **Search Actions** link from the left sidebar.
SECTION 10: SEARCH ACTIONS

10.1 Search Actions

Step 2: Follow the 3 simple steps below

- **#1 - Enter the Position Number** for the position you are checking on.
  You can also search by Job Title or Request Number.

- **#2 - Select “Check All”** above the list of Action Statuses (the boxes on the right of your screen).
  You can also search by a specific status in the list.

- **#3 - Select Search.**
SECTION 10: SEARCH ACTIONS

10.1 Search Actions

Step 3:
- Your search results will appear on the View Actions Screen
- To view an action(s) for the position you searched for, select View Summary.

The illustration above shows indicates that Position# 313111 was approved on 11/12/2013. The same position number has a request for Special Pay Increase in progress (pending with the VP).
SECTION 10: SEARCH ACTIONS

10.2 Pending Actions

Use this feature to quickly find actions which require your approval.

Step 1:
- Select the Pending Actions link on the left sidebar.

Step 2:
- The Pending Actions screen will display any action that requires action by an approver.
- Select View under the Title requiring action.
STEP 3:
- The approver will have various Action Statuses available, depending on what the action is and where it is in the workflow process.
- The approver may also have the option to use the Edit link to open and edit the information in the position description before taking action.
10.3 Historical Actions

Step 1:
- Select the **Historical Actions** link on the left sidebar.

Step 2:
- The **View Historical Actions** screen will display a table of only APPROVED actions within your department.
- You can sort the search results by clicking on any of the arrows in the header fields.
- Select **View Summary** to view the action details.
SECTION 11: CREATE RECRUITMENT REQUEST FROM PD
Create Recruitment Request from a Position Description

Step 1:
● Log in to OASys.
● If you do not see the Recruitment features on the left sidebar, change your User Type.

Step 2:
● Under Create Recruitment Request, select From Position Description.

Step 3:
● Select the Position Description you want to be the basis of your recruitment request.
● You can search by Position Number, Job Title or Class Code.
● Select Search.
SECTION 11: CREATE RECRUITMENT REQUEST FROM PD

Create Recruitment Request from a Position Description

Step 4:
• From the search results table, select Create for the position number you want to recruit for.
SECTION 11: CREATE RECRUITMENT REQUEST FROM PD

Create Recruitment Request from a Position Description

Step 4 (continued):
- The recruitment request will appear on your screen.
- Certain fields from the Position Description will populate into the request; you will need to edit as needed and fill in other fields as you typically do.

Note: For more information about the Recruitment process, please contact the Office of Human Resources.
**SECTION 12: APPROVAL MATRIX FOR ALL ACTIONS**

**Approval Hierarchy**

The table below shows the order of approval required for each action in the PD Module.

<table>
<thead>
<tr>
<th>Action</th>
<th>User</th>
<th>Submit to</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ESTABLISH A POSITION</strong></td>
<td>PDPOC</td>
<td>DDD</td>
</tr>
<tr>
<td></td>
<td>DDD</td>
<td>VP</td>
</tr>
<tr>
<td></td>
<td>VP</td>
<td>HR</td>
</tr>
<tr>
<td></td>
<td>HR</td>
<td>Approves</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>UPDATE A POSITION</strong></th>
<th>User</th>
<th>Submit to</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PDPOC</td>
<td>DDD</td>
</tr>
<tr>
<td></td>
<td>DDD</td>
<td>HR</td>
</tr>
<tr>
<td></td>
<td>HR</td>
<td>Approves</td>
</tr>
</tbody>
</table>

*This represents the typical workflow for updating a position. A VP user may also initiate an Update, and submit it to HR.*

<table>
<thead>
<tr>
<th><strong>RECLASSIFY A POSITION</strong></th>
<th>User</th>
<th>Submit to</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PDPOC</td>
<td>DDD</td>
</tr>
<tr>
<td></td>
<td>DDD</td>
<td>DivBudget</td>
</tr>
<tr>
<td></td>
<td>DivBudget</td>
<td>VP</td>
</tr>
<tr>
<td></td>
<td>VP</td>
<td>UnivBudget</td>
</tr>
<tr>
<td></td>
<td>UnivBudget</td>
<td>HR</td>
</tr>
<tr>
<td></td>
<td>HR</td>
<td>VP A&amp;F</td>
</tr>
<tr>
<td></td>
<td>VP A&amp;F</td>
<td>HR</td>
</tr>
<tr>
<td></td>
<td>HR</td>
<td>Approves</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>REQUEST A SPECIAL PAY INCREASE</strong></th>
<th>User</th>
<th>Submit to</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PDPOC</td>
<td>DDD</td>
</tr>
<tr>
<td></td>
<td>DDD</td>
<td>DivBudget</td>
</tr>
<tr>
<td></td>
<td>DivBudget</td>
<td>VP</td>
</tr>
<tr>
<td></td>
<td>VP</td>
<td>UnivBudget</td>
</tr>
<tr>
<td></td>
<td>UnivBudget</td>
<td>HR</td>
</tr>
<tr>
<td></td>
<td>HR</td>
<td>VP A&amp;F</td>
</tr>
<tr>
<td></td>
<td>VP A&amp;F</td>
<td>HR</td>
</tr>
<tr>
<td></td>
<td>HR</td>
<td>Approves</td>
</tr>
</tbody>
</table>

**List of User Types**
- PDPOC = Position Description Point of Contact
- DDD = Dean/Director/Department Head
- DivBudget = Division Budget
- VP = Vice President
- UnivBudget = University Budget
- VP A&F = Vice President Administration & Finance
- HR = Human Resources
FOR QUESTIONS, PLEASE CONTACT:

OFFICE OF HUMAN RESOURCES
CLASSIFICATION & COMPENSATION

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