PeopleAdmin 7

Department Users' Guide:
Creating a New Position Description

This guide was written for use by university employees with primary responsibility for entering job descriptions into the People Admin 7 system, otherwise known as "Level 1" Users.

04/21/2023

PeopleAdmin 7 – Department User's Guide

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Introduction

Welcome to Eastern Washington University's online position management and employment application system, **PeopleAdmin 7** ("PA7").

Your Web Browser

This system is designed to run in a web browser over the internet. The system supports browser versions of Internet Explorer 7 and later, Mozilla Firefox version 5 and later, Apple Safari version 4 and later, and Google Chrome. However, some of the older browser versions are less powerful than the newer versions, so the appearance of certain screens and printed documents may be slightly askew. Please contact your designated IT professional (or place a Help ticket) if you experience significant issues in accessing and viewing within the system.

The site also requires you to have Adobe Acrobat Reader or other .pdf software installed. Acrobat Reader is a free download available at http://www.adobe.com.

Security of Applicant Data; Automatic Timeout

To ensure the security of the data provided by the applicants, the system will automatically log you out after 60 minutes if it detects no activity. However, anytime you leave your computer we strongly recommend that you save any work in progress and logout of the system by clicking on the logout link located in the upper right-hand side of your screen.

Usernames and Passwords; Requesting a New PA7 Account

Please contact your Human Resources Associate; they will provide you with directions on how to request access. You will receive an email when your account has been established.

System User Roles

For new users, here is a list of roles that can be requested in the system:

- Level 1 User – these are department users who have primary responsibility for entering job descriptions into the system.
- Level 2 Users – these individuals are responsible for reviewing and approving job descriptions and hiring proposals within the system; this user type includes managers, AVPs, Deans, etc.
- VP/Provost
- Search Committee Member

Resources

Your primary contact for PeopleAdmin 7 questions is your designated Human Resources Associate:

- ➔ Saundra Godin: Student Affairs, IT, and academic units not associated with a College, such as Grants, exempt and classified employees for the colleges CHSPH and CAHSS
- ➔ Kenlyn Mackey: Business & Finance, University Advancement, President's Office, exempt and classified employees for the colleges CPP and CSTEM
- ➔ Britt Pirker: Faculty

Several online resources are also available on the HR website for your use and reference in using PA7:

Department Users' Guide	Contains the same information as this printed version, with hotlinks to allow you to move quickly to the section you need.	*(future - insert web link here)*
Approvers' Guide	Whether you are a Dean, Department Manager, or VP, this guide provides the easy step-by-step guidance you need for quickly finding positions in your unit for your review and approval.	*(future - insert web link here)*
Search Committee Guide	This guide provides information needed by Search Committees to access and navigate the system. This guide should also be used by Approvers to access job postings and their associated applicants.	*(future - insert web link here)*
Hiring Proposals Guide	Primarily for use by Department Users' or other parties with authority to enter hiring proposals into the PA7 system.	*(future - insert web link here)*
Quick Guides	Formatted as a checklist or bulleted list, these are designed for experienced systems users as a reminder of key processes and steps in the workflow.	*(future - insert web link here)*
PA7 Workflow Map	Provides a flowchart overview of system processes.	*(future - insert web link here)*

Before Getting Started

Key Terminology
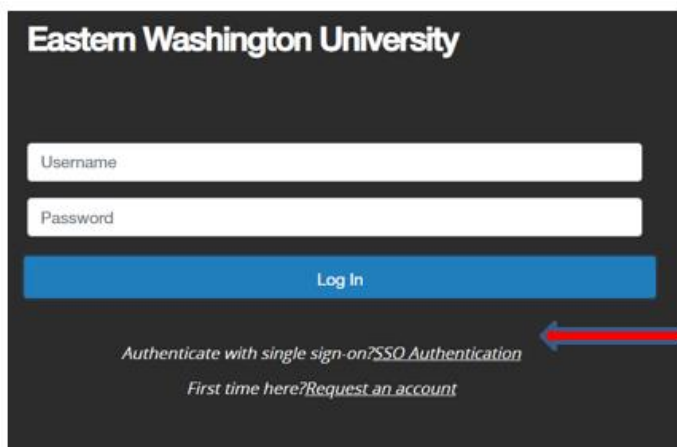
It will be helpful to learn a few key terms, as the various print and online resources frequently use these terms.

Job Descriptions: The data you enter into the system when you are getting ready to post the position.

Workflow: This term refers to how Job Descriptions, Postings, Applicants, and Hiring Proposals ("components") move through the system for review and approval.

State: This term refers to a specific workflow position that a component is at; also referred to as workflow state.

Logging In

PeopleAdmin User URL: https://jobs.hr.ewu.edu/hr

After entering the URL the login screen will appear:

To access PeopleAdmin 7 Click SSO Authentication and log-in (red arrow)
- ➢ You will use your EWU single sign-on credentials to access PeopleAdmin 7.
- ➢ Please ignore the section – Username and Password

You will be taken to the home page for PA7. See the next page for a screen shot of the Home page with explanations of key sections of the home page.

Home Page

This is the page you will see when you log in. It presents a dashboard that provides access to:

➡ **Navigation bar**, at the top, which has tabs to provide access to the main areas of the system

➡ **Inbox** which has items that need your attention, such as items requiring your review and/or approval

➡ **Watch list**, these are items you have specifically tagged to "watch" so you don't have to search for them when you login to the system

➡ **Module selector,** drop-down box in the upper left corner, which allows you to switch between the two main system modules:

  ➢ **Applicant Tracking** – this is where you gain access to job postings and applicants; this is the default module that comes up when you login; notice that the dashboard background color is blue as shown in the screenshot above.

  ➢ **Position Management** – this is where you create and/or update job descriptions; when you're in this module, the dashboard background color is orange:
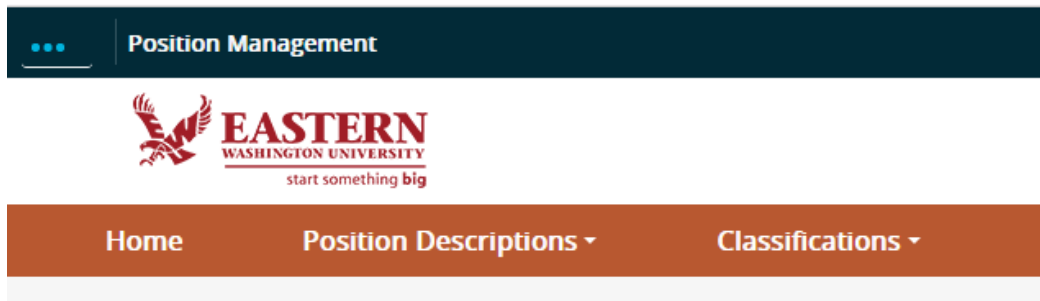
Your system privileges determine the modules you can access and the tabs available to you in each module. Search committee members and chairs only have access to the Applicant Tracking module (unless they also have a second defined role in the system which provides them access to Position Management). All other users may access both the Applicant Tracking module and the Position Management module.

How Pages Are Organized

You will see **tabs** displayed at the top of the screen for each module. For example, in the Applicant Tracking Module, you will see Postings and Hiring Proposals.

When clicking on a tab, you will always select the type of position you are trying to find from the tab drop down menu (Classified, Faculty, or Exempt). For example, in the screenshot below, *Postings–Classified Staff* was selected, resulting in the following display:
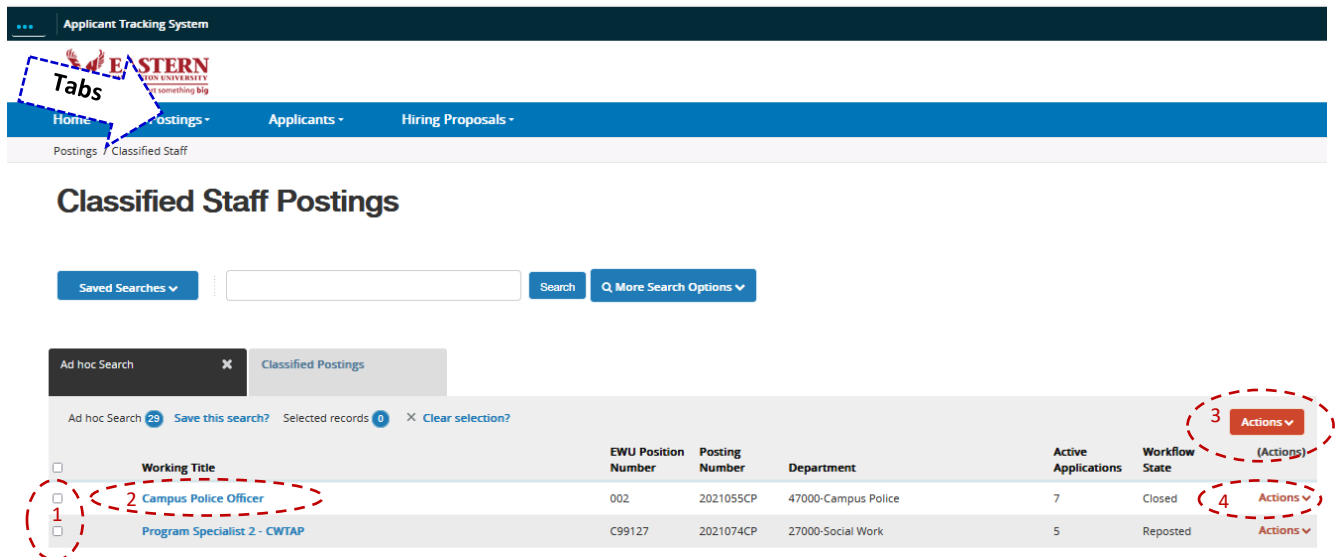
On pages that present lists of similar items, such as shown above, typically these things are true:

1. A check box is associated with each item to allow you to select more than one at a time for bulk operations.

2. The name of each item in the list is a link that opens the summary view.

3. The Action button will show a menu of bulk operations and general actions.

4. The Action link for individual items presents a separate menu of one or more actions you can take on the item.

Left Panel Navigation (How to Skip Ahead to Another Section)

Position Requests / ... / New Position De

Editing Position Request

- ✔ Classification
- ✔ **Position Details**
- ✔ Supervisory Position
- ✔ Seated Employee
- ✔ Position Documents
- Position Request Summary

Left panel navigation becomes available once you initiate a new job description or posting. You can use this left-hand menu to move through each section, or to skip ahead to a later section, or use the **Save & Continue** button to proceed to the next section.

Caution: You will need to click on the Save button in each section *before* using left panel navigation, otherwise your data entry in that section will be lost. If you use the **Save & Continue** button to proceed, your data will be automatically saved.

If you forget to save your work and attempt to use left panel navigation, the system will provide a warning.

ewu-sb.peopleadmin.com says:

There are unsaved changes on this page. Do you want to leave the page and lose all changes?

☐ Prevent this page from creating additional dialogs.

OK   Cancel
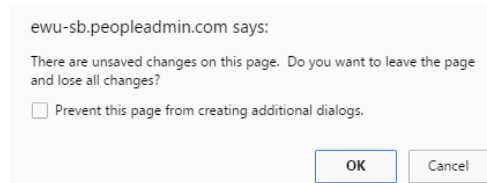
Searching in PA7

Basic Search Tips and Search Filters

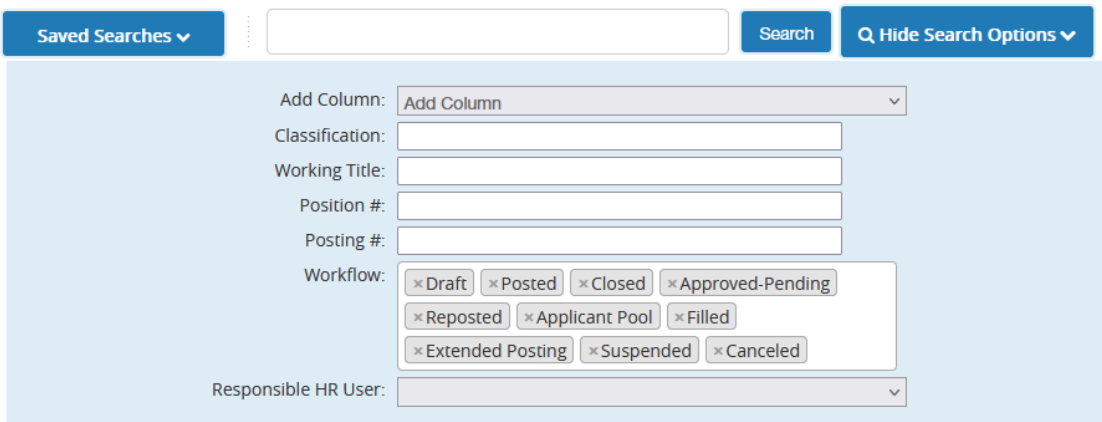When using the search feature, PA7 will search all text fields that you have access to.

For example, if you search for John Smith in the Applicant Tracking module, it will return results found in fields for applicant name, supervisor, reference or other fields associated with Applicant.

You can narrow search results through the use of *filters*. Filters make it easier to find the specific PA7 record you are seeking. Dedicated filters reside on system pages within both the position management and the applicant tracking modules.

This example shows the filters that reside on posting pages; you can hide these filters by clicking on the **Hide Search Options** ▽ tab.

Some filters contain a menu of options to scroll through and select for filtering, whereas other filters are open text fields. If the available filters are insufficient for narrowing your search, you can also use the **Search** field at the top of the filters list.

Types of Searches (Global, Group, Personal)

Filters only function as a screening mechanism to help you find the specific record you are seeking, but they do not generate the columns of data that will appear on your screen once you click the **Search** button. To display the desired columns of data when you search, you may select from dedicated Global Searches or Group Searches (which HR creates), or Personal Searches that you create and save. Or, you can select a saved search and then modify it to display the columns of data you wish to see (and then either save the modified search as a new personal search, or discard the search when you are through using it).

Global standardized searches have been established for each system page. These may be found by clicking on the **Saved Searches** tab. For postings, the column headings shown below are the result of the search called, **All Posted Positions,** which has been saved as a global search for postings:

As you can see at right, this global search displays Working Title, Posting Number, Department, number of Active Applications, and Workflow State for each posting.

For this example, the results were also *filtered* to only show Posted and Closed positions.

Modifying Existing Searches

Let's suppose you want to modify what is displayed on your screen after running a search. By hovering over the column header, controls show up which allow you to:

o   Move the column left or right in the display,
o   Sort column data in alpha-numeric or reverse order, or
o   Remove the column.

These changes to a search are temporary, unless you save the search as a new *personal* search.

Let's suppose you want to add another column to a search, for example, you want to know the closing date for postings.

First, if you hid the filters, un-hide them by clicking the tab for **Hide Search Options** ▽ tab.

Then click the arrow to display the drop-down menu of columns available for the page you are located on, then scroll and click any column(s) you wish to add to the search.

The system will automatically add the column to the display.

See the next image for the display results after adding a column for closing date.

Remember, you can save modified searches by clicking on the link for *Save this search?* and then name your search and save it as a personal search.

If you want to make a search your ***default search*** so that it populates your screen whenever you visit that page within the system (i.e., the posting page, or job descriptions page, etc.), click on **Save this Search** button, enter a name for the search, select Personal Search, then click the radio button for **Make it the default search?** The customized search has now been saved. You can create multiple saved searches, and to access them, just click on the tab for **Saved Searches ▽**, then scroll and select the search name to view that particular search.

Summary of Global Saved Searches

Job Descriptions	*Postings*	*Hiring Proposals*	*Applicants*
• All Job Descriptions	• All Postings	• All Hiring Proposals	• Applicants • Applicants with contact information

Additional Helpful Search Tips

- Text search is not case sensitive.

- Enter whole words or fragments, except note that the fragment you enter to search on must either be part of the first word in the field being searched, or preceded by a space in the field. Example:

Working Title	You may search on any of the following:	These fragments will *not* work:
Office Assistant 3 - Economics	Office (whole word)	fice
	Offi (part of the first word)	ant 3
	Econ (part of a word preceded by a space)	nomics

- Searches normally return items that contain all your search terms. For example, if you enter assistant 3 in the example above, the search returns items that contain both these words, including "Office Assistant 3 – Economics" and "Administrative Assistant 3 – Controller's Office."

- To exclude search results, use the minus (-) character. For example, to search for positions that include "Office Assistant" but not "Administrative Assistant," enter *assistant –administrative*.

- You can't do a search that only specifies what not to return, such as *-economics*.

- You can't do a search for a word or phrase that was selected from a drop-down list, such as the name of a state, but you can use *filtering* to find the information.

Export Your Search Results

Once you've run a search and modified it, so that the information you need is displayed on your screen, you may export the search results into an Excel spreadsheet. Click on the **Actions** button and select Export results. Please note that there is a 1000 line limit that can be exported.

Creating Position Descriptions
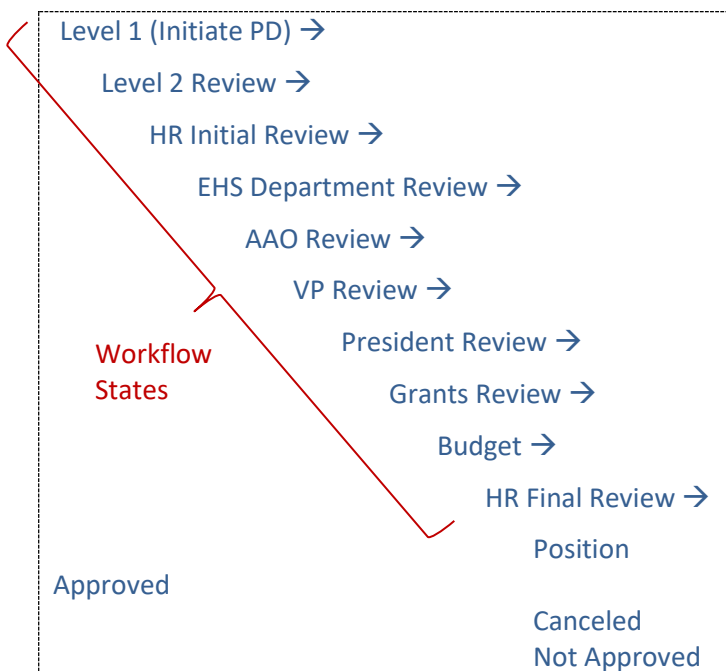
Introduction

The position description is used to describe the key responsibilities of the position and its qualifications. Without a good, up-to-date position description, it is unlikely that the best candidate will be hired for the job; and/or employee performance will meet your expectations. A complete and approved position description is required whenever any of these personnel activities are needed:

➔ Prior to recruitment (posting jobs to Eastern's site and subsequent external advertising)

➔ Prior to hiring persons on a waived recruitment basis

➔ Prior to reassignment of current employees into new positions

➔ Following completion of an employee-initiated job audit

➔ Following completion and approval of a management-initiated position reclassification

Before creating a new position description, search the system to make sure a position description doesn't already exist. When using an imported position, it must be carefully reviewed and any missing information must be provided before sending the position through the system for approvals.

Workflow (How Positions are Routed for Review and Approval)

Once a new position is created at the Department level, or an existing position is updated, the position will be routed through successive workflow states allowing required approvers to review and approve the positions. Positions are approved by moving them "down" the list to the next workflow state.

Level 1 (Initiate PD) ➔
  Level 2 Review ➔
    HR Initial Review ➔
      EHS Department Review ➔
        AAO Review ➔
          VP Review ➔
            President Review ➔
              Grants Review ➔
                Budget ➔
                  HR Final Review ➔
                    Position

Workflow States

Approved

Canceled
Not Approved

Workflow Notes:

Level 1 is shown as the position which initiates position descriptions, simply because this is the type of system user who most commonly handles this activity.

However, Level 2 and HR users may also initiate position descriptions.

If a workflow state doesn't apply to a position, it may be skipped.

You may see where in the workflow a position or hiring proposal is at, by clicking on the History tab within the item you are tracking.

Getting Started; Overview of the Position Description Page

After logging into to PA7 (https://jobs.hr.edu/hr), switch to the Position Management module in the top left-hand corner.
Then move to the top middle of the page and click on the tab for Position Descriptions to display the available options.
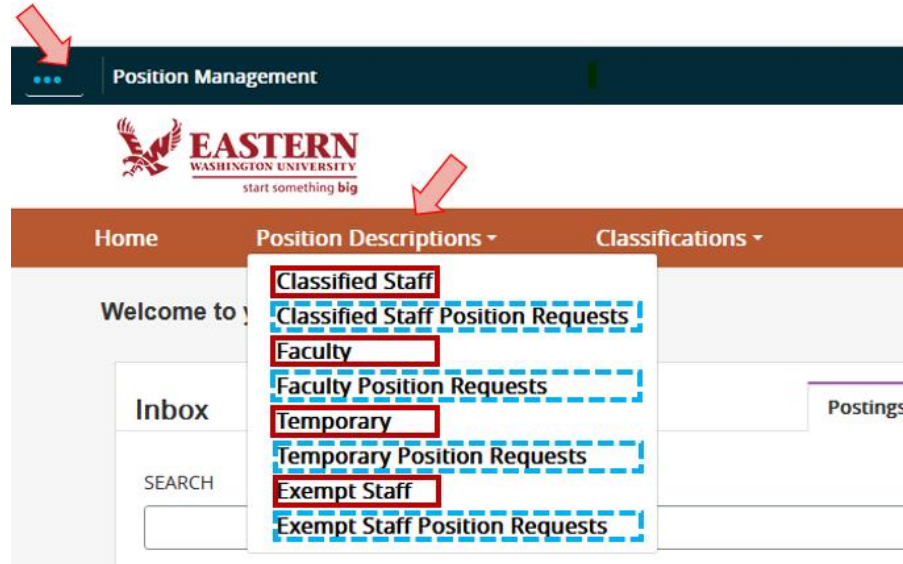
In the drop-down menu, you will see separate links for **position descriptions** and for **position requests** for each type of university employee.

➔ Select the position description option if:
- You want to view a list of active (approved) position descriptions, or
- You want to create a new position description, or
- You want to enter a major or minor update to an existing position description.

➔ Select the position request option if:
- You want to see a list of what position description requests have been initiated and their status (that is, where the position is at within the position description workflow).

Beginning a New Position Description

1. Login to PA7 and switch to the Position Management module.
2. From the Position Management home page, hover over the tab for Position Description, and slide down to select the position description link for the employee group you need to work on (Classified, Faculty, or Exempt). In this example, Classified was selected:
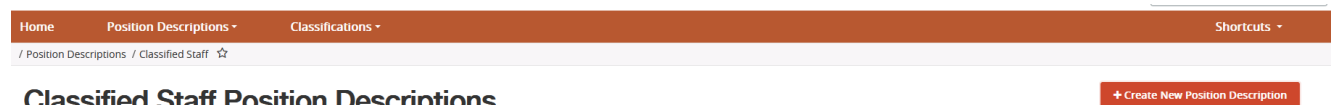
Note: select "Classified Staff," not "Classified Staff Requests," as the later applies to requests that have already been initiated in the system.

3. Click on the **Create New Position Description** button in the upper right portion of your screen, and the following screen appears:

4. You have two options at this point: you can begin from scratch and complete all the necessary fields and pages to create a brand new position (Step 5), ***or*** you can "clone" an existing position description to use as your basis for a new position description. See Steps 6, 7 and 8, for instructions on cloning a position; otherwise, complete Step 5, then skip to Step 9 to creating a new position from scratch.

5. Option 1 – create a new position description, four fields need to be completed:

-   For Working Title, use the following format: *Classification – Department*; examples:

    > Program Coordinator – Social Work

    > Director – MBA Program

    > Assistant Professor – Spanish

    > Consistent use of this format allows all of us to search and find positions more efficiently. Therefore, do ***not*** use connector words (of, in, for) as part of your working title (~~Program Coordinator of Art~~).

-   Branch is a drop-down menu, allowing you to select Academic Affairs, Business and Finance, etc.

- Division is the next organizational "unit," and is also a drop-down menu. For example:
  - If Academic Affairs is selected as the Branch, then the Division menu will list the Colleges, Library, Graduate Studies and other academic major units.
  - If Student Affairs is selected as the Branch, then the Division menu will list Enrollment Services, Student Life and Student Affairs (the later involving the Office of the VP of Student Affairs).

- Department is also a drop-down menu, and only the departments associated with the selected Division will be displayed.

6. Option 2 - clone a position description. Scroll down until you see the following:

Followed by a list of all of the active positions in the system. To quickly find the position you wish to clone, use the search box at the top to search for a working title or other unique job identifier, or use the other fields provided to filter on Department, or position description Status, and/or Position Number. An option is also provided to add columns to your screen display, but it shouldn't be necessary to do so, because the standard display includes Working Title, Position Number and Department.

7. Once you find a position description you may wish to clone, you may view that position prior to selecting it. Click the link for **Actions** at the end of the line containing the position; you will see another link for **View** which allows you to review the selected description.

Once you're done viewing the position, click your browser's back-button, to go back to the classification/cloning page.

8. Once you are satisfied with the position you wish to clone, click the radio button next to the Working Title, and click the **Start Position Request** button in the lower right corner.

Clone an existing Position Description?

	Working Title	Department	Position Description Number	Status	Last Updated	(Actions)
⦿	Snack Bar Lead	46450-Dining Services	C99240	Active	August 08, 2022 at 08:35 AM	Actions ⌄

Cancel   Start Position Request

9. After you clone a position, or start a position from scratch, you click the **Start Position Request** button; at this point, the initial page for defining your position opens up and looks like this:

Editing Position Request
- Classification
- ✔ Position Details
- ✔ Position's Supervisor
- ✔ Seated Employee
- ✔ Position Documents
- Position Request Summary

Classification

Save   Save & Continue

Selected Classification

Classification Details

Classification Information

Classification Title	Snack Bar Lead
Classification Code	6740
FLSA	Non-Exempt
RCW Exemption Criteria	No Exemption
Bargaining Unit	BU 1
Salary / Wage Range	CS - 34
Application Types Accepted	Application
EEO Job Group	72 - Service/Maintenance Workers
IPEDS	

Classifications - Filter these results

All Classifications   "All Classifications" (240)   ✕ Delete this search?

← Previous 1 2 3 4 5 6 7 8 Next →

	Classification Title	Classification Code	Salary / Wage Range	Classification Status	(Actions)
○	Procure Supply Spec 4	114H	CS - 55	Approved	Actions ⌄

You will move through multiple pages, completing information along the way and attaching needed documents, as you work to develop your position description.

Note the <u>left navigation panel</u> where you will see each page associated with that type of position description. Pages without a checkmark, means that there is required information that needs to be entered on that page.

The screen shot above displays the first page for a position description, which is the **Classification** page.

Selecting the Classification for the Position

10. To find the classification that applies to your new position description, click on the link for **Filter these results**. A search box will appear as shown on the next page.

Enter a word or two associated with the classification you're seeking; in this example, enter *Program Coordinator* into the search box, then click **Search**.

It shouldn't be necessary to add columns when searching for classifications, as a column for "Classification Job Title" will be present once you click **Search** (see below).

Searching for *Program Coordinator* as a classification produces this result:

When the classification is displayed on the screen, click the radio button beside the Classification Job Title, and click the **Save & Continue** button.

Note: "radio button" refers to the little circle you click on to select one option in a list of options.

If you can't find a classification for the position you are creating, you can skip this page, but do contact your HR Associate and request that the classification be added.

Once your HR Associate has created the new classification, we will add the classification to the position description you are working on.

Position Details Page Overview

Once you've selected the appropriate classification (or decided to skip it, if you cannot find the classification), the Position Details page will be displayed.

11. Move through the Position Details page, and complete all fields for which you have information.

Fields noted with a red asterisk * are required fields.

Position Details Fields – Complete List

Note that you can use **bold,** *italics,* and • bullets, to format the information within the Position Details fields. See the next section, **Formatting Text in Job Descriptions and Postings**, for details on how to apply specific formats to the test you enter within Position Details fields.

This page requires the most effort to complete. Consider clicking the **Save** button periodically, so that you won't lose your work if there is any interruption and/or your computer experiences a glitch.

Required Field	Field Label	Comments (if any)
Position Description Information		
*	Working Title	This field populates from your initial entry when starting a new position description.
	EWU Position Number	Enter position number if available
	CUPA Code	Drop down menu for all faculty, professional and administrative position codes. Scroll and select, or select "No Match" at the start of the menu list.
	Job Summary	The Job Summary should be written in the style of a job posting. Enter appropriate Benefits information
Conditions of Employment		
	Conditions of Employment	Enter appropriate information including information on background check, Immunization information, required DEI – training, etc.
	Physical Demands	Briefly describe any *unusual* physical demands, or enter n/a.
	Background Check	Drop down menu. Scroll and select the appropriate level of background check required for the position.
	The next four Conditions of Employment fields are completed only by our **Environmental Health & Safety staff**. Just as they do today, they will review the *Essential Functions Analysis,* and then will enter information into these fields as necessary.	
	Pre-Placement Physical	Skip.
	Hearing Test	Skip.
	Medical Monitoring Post Hire	Skip.
	Protective Equipment	Skip.

	Required Qualifications	Enter required qualification
	Preferred Qualifications	Enter preferred qualification
	Other Skills and Abilities	If a qualification you would like to list is not measurable, consider listing it within this new field. Example: *Ability to work independently as well as part of a team.*
	Previous Incumbent	Use the format, P. Smith.
	Date Vacated	Enter date
	Location	Use simple descriptions to indicate the position location; for example: • Cheney Campus • Spokane Campus • Vancouver, WA • Coeur d'Alene, ID
	County	Enter county
	Work Schedule Type	Enter appropriate work schedule type
	Work Schedule	Enter a simple description of the expected work schedule
	Project Description	Enter project description if applicable
	Project Duration	Enter project duration if applicable
	% Full Time	Enter appropriate information

	Term of Appointment	Use one of the following formats:
		     12 months per year
		     9 months per year, mid-September through mid-June
		     Budgeted only through 6/30/2017
		 …or other simple descriptions.
		
		 Note that if you only enter "12 months," it can lead to confusion, as that statement could be interpreted as either 12 months per year, **OR** as 12 months *only*.

	Approval Notes	Enter appropriate approval notes
Department Information		
	Level 1 User with Access	Select the Departmental Users – ***including yourself*** – to allow access to the Position Description.
	Responsible HR user	Enter appropriate HR user (HR Associate)
	Budgeted Salary	Enter appropriate information
Funding – there is a minimum of one entry for this field. Click the **Add Funding Entry** button, and complete the fields that open up, as listed below. If more than one index is needed, after completing the data entry for the first index, then click the **Add Funding Entry** button again to add a second (and third, etc.) index number.		
	Index Number	Enter index number
	Percent	Enter appropriate percent (limited to 3 digits).
	Budget Note	Enter appropriate budget note
	☐ Remove Entry?	If you need to delete a prior budgetary entry, check this box, and re-enter the correct budgetary information.
Proposed Job Duties – there is a minimum of one entry for this field. Click the **Add Proposed Job Duties Entry** button, and complete the fields that open up, as listed below. A well-designed job description will group similar or related job duties into groups; each group is entered separately into PA7 with an overall percentage entered for that group of duties. Once one group of duties has been entered, click the **Add Proposed Job Duties Entry** button again to add a second group of job duties (and third, etc.)		

	% of Time	Enter appropriate %
	Responsibility / Duty	Enter appropriate information
	Essential Duty?	Enter appropriate information
	☐ Remove Entry?	If you need to delete a prior entry, check this box, and re-enter the updated job duties information.
Requisition Form		
	Requested Posting Date	Enter appropriate information
	Requested Closing Date	Enter appropriate information, if applicable
	Open Until Further Notice	Select Yes, if applicable
	Screening to Begin	Enter appropriate information; note this field is a **text field**.
	Anticipate Start Date	Enter appropriate information; note this field is a **text field.**
	Special Instructions to Applicants	Enter appropriate information
	If you plan to advertise externally, indicate the advertising sources.	This provides an expanded list of commonly used external advertising resources. Select all that apply.
	If "Other" was selected as an advertising source, please list details here.	Describe any other advertising sources to be used, including listservs, etc.
	Affirmative Action Comments	For the use of AAEO Director only
	Index Number for Recruitment Advertising	Enter the appropriate index number
	Search Chair	Drop down menu; scroll and select if known; otherwise, skip this field.
	Search Committee Members	Drop down menu; scroll and select if known; otherwise, skip this field.

12. When you have completed all of the fields, click **Save & Continue** and move to the next section.

Describing Faculty Job Duties (Special Language Required)

Tenure track, tenured, and special faculty positions use standardized language for the job duties field.

Tenure Track, Tenured Faculty

Option A.   For this option, the "duties" are listed together as one group, set at 100%.

A Faculty Activity Plan will be developed by the end of the first quarter of the selected candidate's appointment, and will consist of a combination of teaching, research, service and/or release time to perform administrative duties, as negotiated and as needed to meet the business needs of the department.

Teaching: typical workload for this position will involve 36 credits per academic year (80% of the workload), subject to department needs.

Teaching includes the following additional responsibilities as defined in the faculty CBA:
- Meet all scheduled classes

- Plan, organize and inform students of course content, texts, readings, assignments, attendance expectations and methods of evaluation including grading scales
- Schedule and attend office hours
- Turn in grades according to established deadlines

Additionally, all faculty are expected to engage in effective teaching and assessment of student learning.

Option B.   This option includes the same standardized language, but includes more detailed standard language regarding scholarship and service, and allows for customized language in describing teaching.

80% Teaching activities include the following related responsibilities:

A Faculty Activity Plan will be developed by the end of the first quarter of the selected candidate's appointment, and will consist of a combination of teaching, research, service and/or release time to perform administrative duties, as negotiated and as needed to meet the business needs of the department.

Typical workload for this position will involve 36 credits per academic year, subject to Department needs, mainly at EWU's main campus in Cheney, WA,

Customize for the position This position will teach courses in introductory geography, world regional geography and/or GIS courses as well as upper-division courses in his/her areas of specialty, as well as and/or other courses that fulfill the need of the Department and Program

All faculty are expected to engage in effective teaching and in assessment of student learning outcomes.

Teaching also includes the following additional related responsibilities as defined in the faculty CBA:
- Meet all scheduled classes
- Plan, organize and inform students of course content, texts, readings, assignments, attendance regulations and methods of evaluation including grading scales
- Schedule and attend office hours
- Turn in grades according to established deadlines
- Advise students who are declared majors on department, college and University requirements and career opportunities.

10% Scholarship/Creative Activity: this position will be expected to engage in research, scholarship and/or creative activity, including professional activities leading to publication, performance, and/or formal presentation in the field. Additionally, the position is expected to pursue research funding through grant development.

Mentor student research.   *Note: delete if not relevant to the position.*

10% Provide school, college, university, community/civic service, including service on committees. Participate in the leadership of local, state, and regional professional organizations.

Collaborate with colleagues in utilization of creativity and best practice knowledge in curriculum development, classroom instruction, and student supervision.

<u>Special Faculty</u>   For SF positions, the "duties" are listed together as one group, set at 100%:

Teaching: typical workload for this position will involve 45 credits per academic year, subject to department needs.

Customize for the position   The primary responsibility will be to teach lower division mathematics, possibly including developmental mathematics courses.

Teaching includes the following additional related responsibilities as defined in the faculty CBA:
- Meet all scheduled classes
- Plan, organize and inform students of the course content, texts, readings, assignments, attendance regulations and methods of evaluation including grading scales
- Schedule and attend office hours
- Turn in grades according to established deadlines
- Advise students who are declared majors on department, college and University requirements and career opportunities.

All faculty are expected to engage in effective teaching and in assessment of student learning outcomes.

See next page for information on describing Faculty Release Time within the PA7 Job Duties section.

Faculty Release Time

If a faculty position has release time, then you should have at least two sections within job duties, one for the standardized text as shown above for both TT and SF positions, and the second separate section (with the correct percentage of time) describing release time to perform the administrative duties associated with the position. The example provided below involves a Lecturer responsible for field supervision of students:

90% Release Time for Field Supervision (40.5 credits equivalent):

Initial workload will consist of the following activities, and are subject to revision by the Chair and Dean to meet changing departmental/program needs.

- Evaluate and mentor candidates in the field using criteria based on best practices.
- Provide oral and written feedback to candidates.
- Support candidates in providing instruction that aligns with state standards and meets students' needs.
- Maintain regular and effective communication with colleagues, candidates, administrations and participating teachers.
- Participate in regular faculty meetings.
- Participate in ongoing program approval, accreditation and assessment efforts.
- Serve as an ambassador from EWU to external partners.

10% Teaching (4.5 credits equivalent):

Teach undergraduate courses as assigned to meet Departmental needs.

All faculty are expected to engage in effective teaching and related activities, and in assessment of student learning outcomes.

Supervisor Identification

For Classified and Exempt positions, your next step is to identify the position's supervisor and then associate the *supervisor's position description* with the new position you are creating.

The supervisory page is very similar to the opening page for selecting classification: you'll see a list of university positions.

To narrow your search and find the correct position that is a supervisor to the position you are creating, click the link for **Filter these results**, and a menu will open up.

You may enter a unique identifier into the open search box, and then click **Search**, or you may *filter* the results by selecting options with the filters within the menu box. For example, if you know the supervisor's position number, then enter that into the Position Number field, and click **Search**.

If you find the supervisor's position description, click the radio button to the left of the supervisor position title, then click the **Save & Continue** button (located at both top and bottom of your screen).

If you don't find the supervisor's position description in the PA7 system, move ahead to the next section, but do let your HR Associate know that you couldn't find the supervisor's position description for the position you are creating in PA7.

If the position simple doesn't exist in the system, that will become a *future* project; that is, to enter the supervisor's position into PA7.

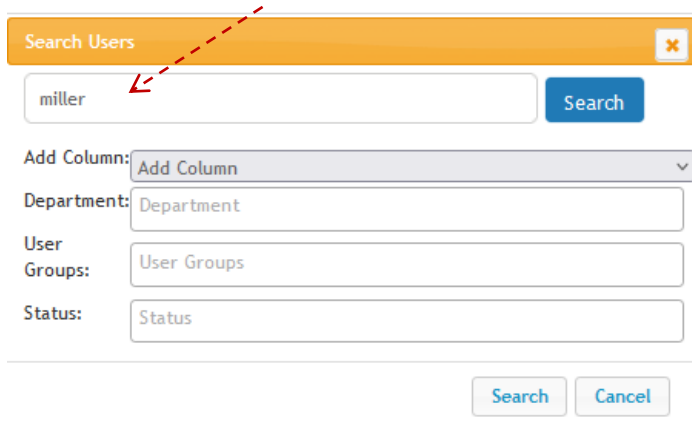**Note: for faculty positions, skip the Supervisory Position section.**

Seated Employee

This section is completed at the time you create a new position description only if both of the following conditions apply:

(1) You know who is going into the position; and

(2) The new position description is being created for one of the following reasons:

➢ The employee is being reassigned to a new position, or

➢ The employee filed a job audit request, and is now being promoted to a higher-level position, or

➢ The employee is being promoted as a result of a management-initiated reclassification request (applies only to exempt employees), or

➢ The position is being filled on a *waived recruitment* basis.

If one of the conditions is not relevant to the position you're creating, then skip the Seated Employee section; otherwise, follow the steps outlined below.

Click the link for **Filter these results**, and a drop down menu of options will appear.
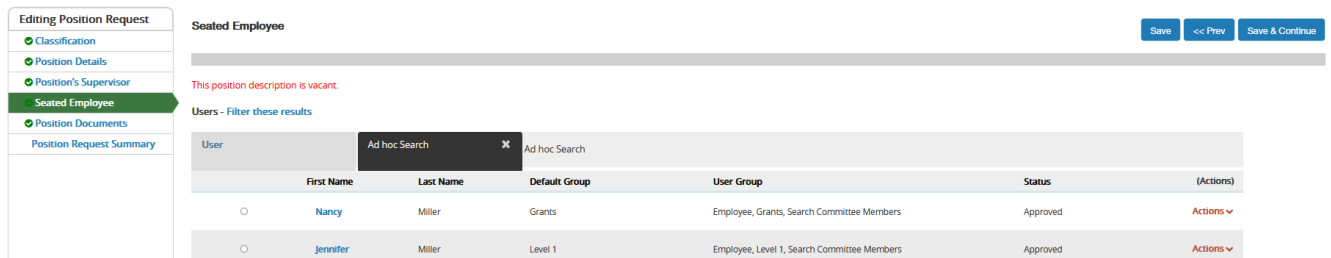
Enter the last name (or first name) into the open search box and click the **Search** button.

In this example, the user searched for the last name of *Miller*.

Click the radio button, then click the **Select User** button.

This brings up a screen showing the employee's name, their work email, and employee number (screen isn't shown in this manual). If you accidentally select the wrong user for a position, look for a button called **Vacate User**, click it, and the erroneous seated employee information will be removed (allowing you to search again for the correct employee name).

For waived recruitment hires, the person being hired will not be in the system for selection and seating into the position being created, so skip this section. Your HR Associate will create a system user identity within PA7 once the action is routed to HR, and will then seat the employee into the position at that time.

Apart from waived recruitment hires, if you cannot find the applicable current employee when trying to seat the employee into his/her new position description, this merely means that the employee has not been entered into the PA7 information with a user identity account. Contact your HR Associate and ask them to add and seat the employee; HR will take care of this when the position description is routed to HR for review and action.

Following recruitment, once a new employee has been hired, Human Resources will "seat" the new employee within PA7.

The next section to work on is for Position Documents. Click the **Save & Continue** button, or navigate to go to this section.

Attaching Position Documents

This section provides links for attaching documents relevant to the position.
Required documents include:
- Essential Functions Analysis;
- Approvals (emails, memos, etc.)
- Performance Expectations, required for Classified positions
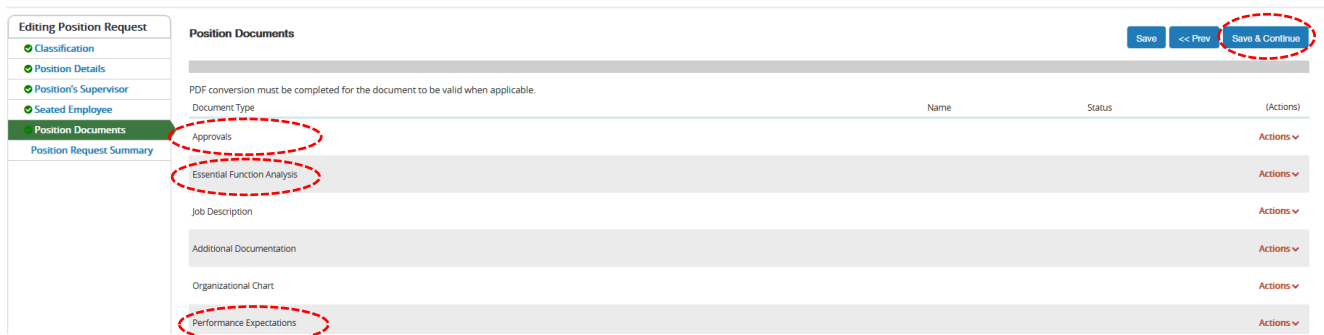
Once you've attached the required and any other relevant documents, click the **Save & Continue** button to navigate to the next section, Position Request Summary.

Position Request Summary
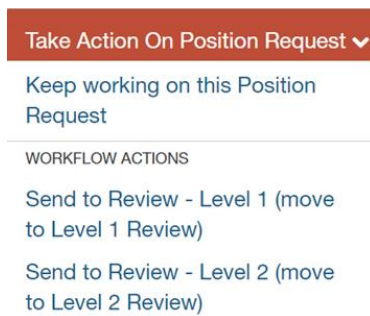
This page merely allows you to review all of the information data entry you've accomplished up to this point. Scroll down and review the information you've entered to create the job description. If you find you need to edit any of the fields, scroll and look for the **Edit** links; these are located at the top of each major section (classification, position details, supervisory position, seated employee, position documents). Click the Edit link, then correct the needed field(s); click **Save** and navigate back to the Position Request Summary page.

Once you're satisfied with the position description and all of its components, click the **Take Action on Position Request** button located in the upper right corner of the page. This will display several options as shown on the next page.

Take Action On Position Request ▾

Keep working on this Position Request

WORKFLOW ACTIONS

Send to Review - Level 1 (move to Level 1 Review)

Send to Review - Level 2 (move to Level 2 Review)

Once you navigate to the Position Request Summary page, click the **Take Action on Position Request** button, then slide down the menu of options, and select the appropriate option. As a Level 1 user, you will see the options as displayed to the left. If the position description is complete, then select **Send to Review – Level 2 (move to Level 2 Review)**; this routes the position electronically to the manager, AVP, Dean, or other designated manager who has the authority to review and approve the position description.

Of course, if you're not quite done with the position, select **Keep working on this Position Request**. The other option, **Send to Review – Level 1**, is for Level 2 system users to use, if they need to send a position back to the Level 1 individual.

As a reminder, here is the workflow for new position descriptions:

Level 1 (Initiate PD) →
    Level 2 Review →
        HR Initial Review →
            EHS Department Review →
            AAO Review →
                VP Review →

Workflow States
                President Review →
                Grants Review →
                  Budget →
                    HR Final Review →
- Position Approved
- Canceled
- Not Approved