Quick Reference Guide – Creating a Position Description (PD)

This will walk you through all the fields for creating a Position Description (PD).

<table>
<thead>
<tr>
<th>What you need to do</th>
<th>What you will see</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>JUSTIFICATION FOR THE ACTION</strong></td>
<td></td>
</tr>
<tr>
<td>Type of action requested:</td>
<td></td>
</tr>
<tr>
<td>● Select New Position when the PD you are creating is a new position.</td>
<td></td>
</tr>
<tr>
<td>● Select Modification when working on a job with an existing PD.</td>
<td></td>
</tr>
<tr>
<td><strong>JUSTIFICATION FOR THE ACTION</strong></td>
<td></td>
</tr>
<tr>
<td>Reason for request:</td>
<td></td>
</tr>
<tr>
<td>● Select Recruitment when the PD you are creating will be used for a recruitment.</td>
<td></td>
</tr>
<tr>
<td>● Select Update/Reclassification when working on an existing PD.</td>
<td></td>
</tr>
<tr>
<td><strong>JUSTIFICATION FOR THE ACTION</strong></td>
<td></td>
</tr>
<tr>
<td>Recruitment Reason:</td>
<td></td>
</tr>
<tr>
<td>● Select the appropriate reason for creating or modifying the PD being used for the recruitment.</td>
<td></td>
</tr>
<tr>
<td><strong>JUSTIFICATION FOR THE ACTION</strong></td>
<td></td>
</tr>
<tr>
<td>Justification for the Position:</td>
<td></td>
</tr>
<tr>
<td>● Use this field to make notes as to why the PD is being created or updated. These notes can be used to communicate with approvers, supervisors, or HR.</td>
<td></td>
</tr>
<tr>
<td><strong>POSITION DETAILS</strong></td>
<td></td>
</tr>
<tr>
<td>Position number:</td>
<td></td>
</tr>
<tr>
<td>● Populated once the job is approved by HR and Budget/Grants has assigned a Position number to the job.</td>
<td></td>
</tr>
<tr>
<td>Working Title:</td>
<td></td>
</tr>
<tr>
<td>● The working title for the position being described.</td>
<td></td>
</tr>
</tbody>
</table>
**POSITION DETAILS**

**Position type:**
- Select the appropriate type of position for the position being described.

**Appointment type:**
- Select the appropriate appointment type for the position being described.

**Recruitment process:**
- Select the appropriate recruitment process for your MAU.

**Recruitment process:**
- Select "Yes" or "No" for each of these questions.

**Select if the supervisory/lead duties of the position are primary or incidental to the work of the job.**

**List PCN numbers of each direct subordinate position the position being created supervises/leads.**
- Multiple PCNs should be separated with a semi-colon.

**Select "Yes" or "No".
POSITION DETAILS

- Select “Yes” or “No” for each of these questions. If you have questions as to whether a position is confidential, contact SW Labor Relations.

- Select the appropriate area where the position will be performing job tasks/where the position is located.

- Grade will be populated when the position is approved by HR.
  - Select the appropriate MAU for the position being created.

- Select the appropriate Division, School, Department, and Team for your unit and MAU’s Team. For more information on how to make the correct selections here, please see...

- Select the TKL for the position being created. TKL can be searched for by clicking on the binoculars. Searches can be conducted by either TKL number or Cost Center name. The TKL can be viewed in numerical order for Number or alphabetically by Cost center name.
POSITION DETAILS
- Job Location is sorted by region and then city within each region. This is used in a recruitment for applicants to search for jobs by the city they are located in.

POSITION DETAILS
- Select the requested classification for the position being created. Classification can be searched on using the binoculars.

POSITION DETAILS
- Once a classification is selected for staff positions using the job family system, click Classification title to see more information about the job. Information from the job classification is here for you to reference when listing job functions, knowledge, skills, abilities, education, and experience on the PD.

JOB DUTIES
- Click the New button. Fill in the percentage of time, and description of each task [group of tasks] that will be performed by this position. Also select if these functions are essential or marginal to the position. When you have added all the information
for each task [group of tasks] click the Add button. Multiple duties are added by selecting new for each task [group of tasks].

<table>
<thead>
<tr>
<th>JOB DUTIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Each of these sections should be filled in with the appropriate information that is required to perform the essential duties of the position.</td>
</tr>
<tr>
<td>Knowledge/Authorities*</td>
</tr>
<tr>
<td>Required Experience*</td>
</tr>
<tr>
<td>Typical Education or Training*</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>JOB DUTIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Advertising summary should be about three sentences (or less) and summarizes the work of the position. This short description of the work performed is used when recruiting for the position.</td>
</tr>
<tr>
<td>Advertising summary*</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>JOB DUTIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Advertising text is a longer description of the work that will be performed by this position. This information is displayed during a recruitment.</td>
</tr>
<tr>
<td>Advertising text*</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>JOB DUTIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Check all the boxes that apply to the position’s budget responsibilities.</td>
</tr>
<tr>
<td>● Fill in the size of the annual budget the position has the responsibility for.</td>
</tr>
<tr>
<td>● Indicate the amount for “Responsible for authorizing expenditures” if the box is checked in the above section.</td>
</tr>
<tr>
<td>● Indicate anything that would be considered an “Other” budget responsibility that might be relevant to the position.</td>
</tr>
<tr>
<td>Describe budget responsibility of this position. Check all that apply*</td>
</tr>
<tr>
<td>Is Responsible for authorizing expenditures</td>
</tr>
<tr>
<td>Budget size (annual):</td>
</tr>
<tr>
<td>If Responsible for authorizing expenditures please indicate amount:</td>
</tr>
<tr>
<td>If “Other” please provide details:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PEER POSITIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Fill in any relevant information on positions that might be considered peers for the position being created. If available, list PCN, Incumbent Name, Incumbent Classification, Department, and MAU.</td>
</tr>
<tr>
<td>Peer Position Info:</td>
</tr>
</tbody>
</table>
## LABOR DISTRIBUTION
- Fill in the Fund, Org, and Percentage of funding the labor should be charged to for the position. There are four (4) Fund, Org, and Percentage fields available. One is required.
- Budget Authorization is a number assigned by budget when the approval the position.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund*</td>
<td></td>
</tr>
<tr>
<td>Org*</td>
<td></td>
</tr>
<tr>
<td>Percentage*</td>
<td>75%</td>
</tr>
<tr>
<td>Budget Authorization</td>
<td></td>
</tr>
</tbody>
</table>

## USERS AND APPROVALS
- Select the appropriate PPA/CCC, Time Sheet Approver, and Supervisor for the position. You can either type the name of the appropriate individual in this box, or click on the binoculars to search for the appropriate individual. This information will be fed to Banner at a later time.

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<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPA/CCC*</td>
<td></td>
</tr>
<tr>
<td>Time Sheet Approver</td>
<td></td>
</tr>
<tr>
<td>Supervisor*</td>
<td></td>
</tr>
</tbody>
</table>

## USERS AND APPROVALS
- Select the appropriate Approval Process. This information is dependent upon the MAU you selected in the Position Details section. Here you can either type the name of the appropriate individual in the boxes, or click on the binoculars to search for the appropriate individual(s). This information is used to route the job for approval(s).

<table>
<thead>
<tr>
<th>Approval Process*</th>
<th>Description</th>
</tr>
</thead>
</table>

## HR CONSULTANT
- Select the appropriate HR Consultant for your MAU/unit. You can either type the name of the appropriate individual in the box, or click on the binoculars to search for the appropriate individual.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Consultant*</td>
<td></td>
</tr>
</tbody>
</table>

## Saving the job
When all job details have been entered, click **Save** to save your job or **Save & Exit** to save your job and exit the position description. **Save a draft** can be used when you need to save the position description you are working on and come back to work on it at a later time.

## Documents Tab
- Attach Org Charts here prior to submitting the PD for approvals.