PeopleAdmin
Classified
Position Management

Version Date: August 2023

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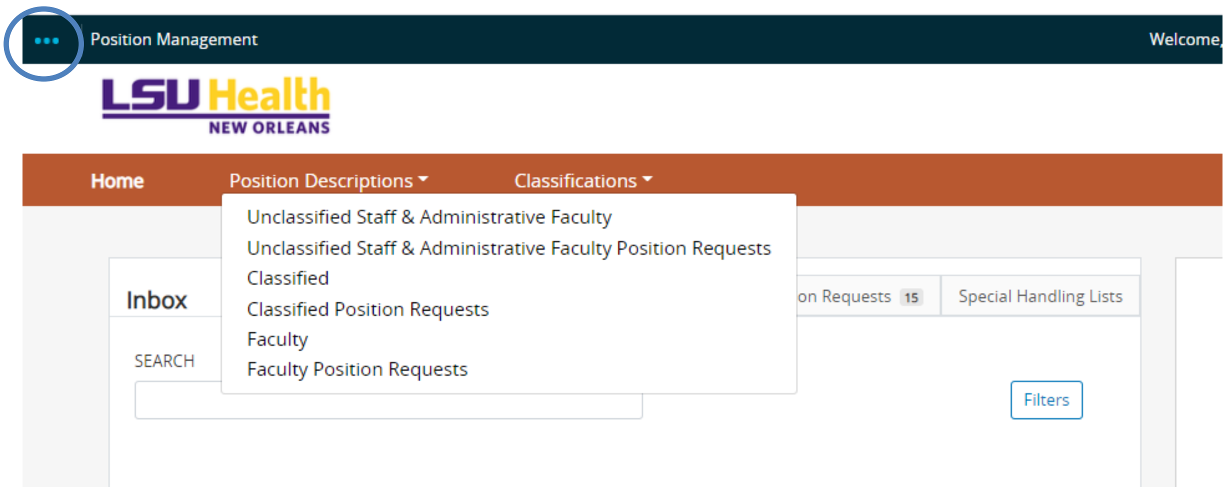
For questions on Position Management, contact the Compensation Department at NOHRMCompensation@lsuhsc.edu.

Position Management Overview

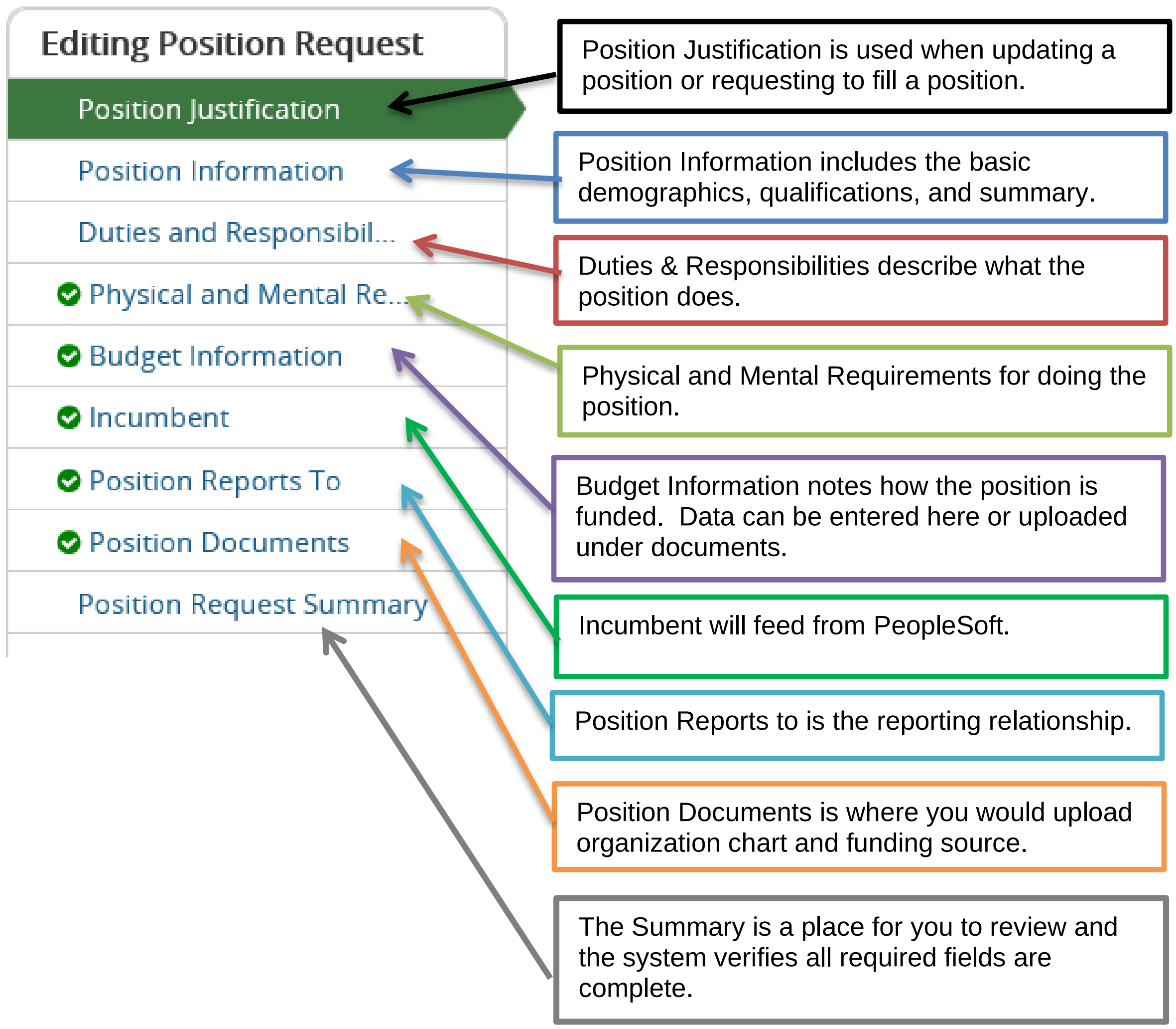
To Access the Position Management Module, Click the **Menu** button (the 3 blue dots) and select the **Position Management** option. This module includes the position description and, for unclassified staff, administrative faculty, and classified positions, it includes the request for authorization to hire.



Position Management maintains position descriptions on classified, unclassified, and faculty positions.

Parts of the Position Description

The Position Description is comprised of the following sections:



General Notes on PeopleAdmin

- Moving from screen to screen with the Next button will save your work. Hit the Save button if you need to log off the system or walk away before completing a screen.
- All fields denoted with an asterisk (*) are required fields.
- Once positions are created, changes to the position summary, duties, and qualifications cannot be updated without going through the approvals again.

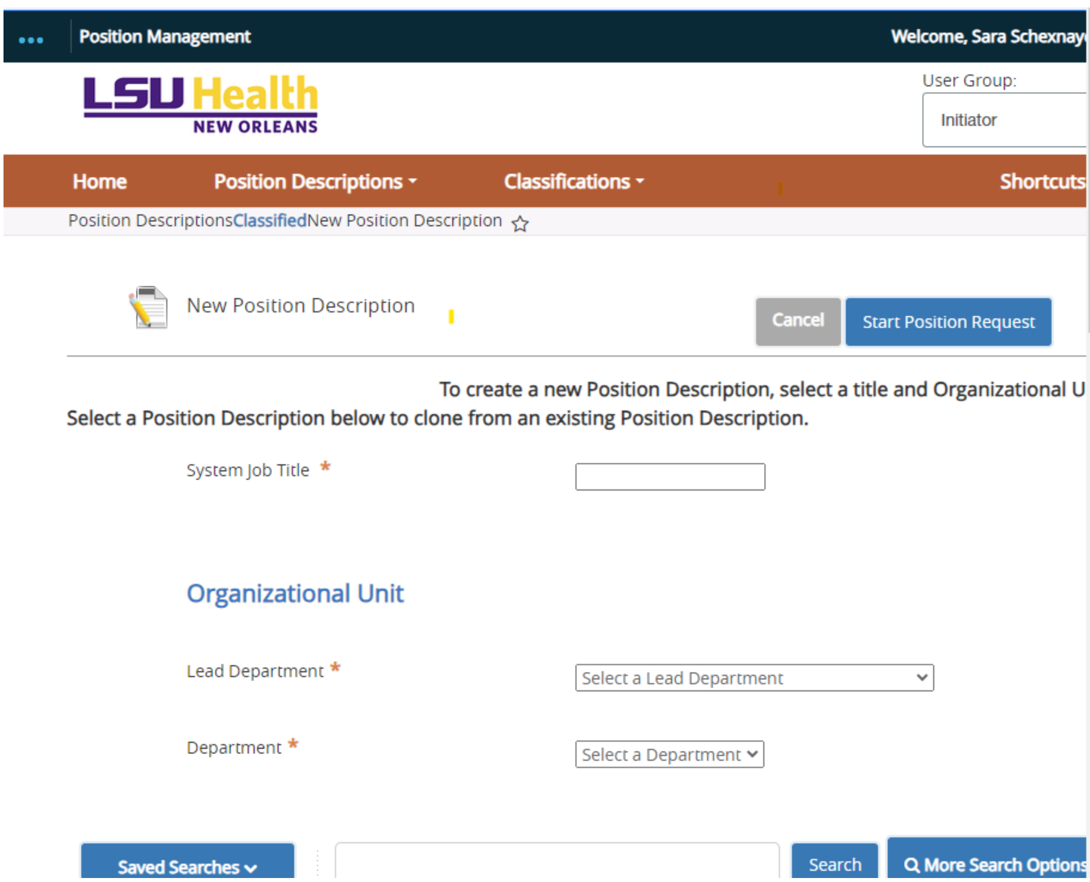
Create New Position Description

When a new position, unlike any existing position, is needed, the initiator will start from a blank template to create a new position description. In most cases, an existing position is modified (to replace an open position or to re-evaluate an existing position) or a job is cloned (when a new position with similar duties to an existing job is needed.)

1. Click the **Position Descriptions** link.

2. Click the employee group link, for example **"Classified"**.

3. Click the **Create New Position Description** button in the upper right corner.



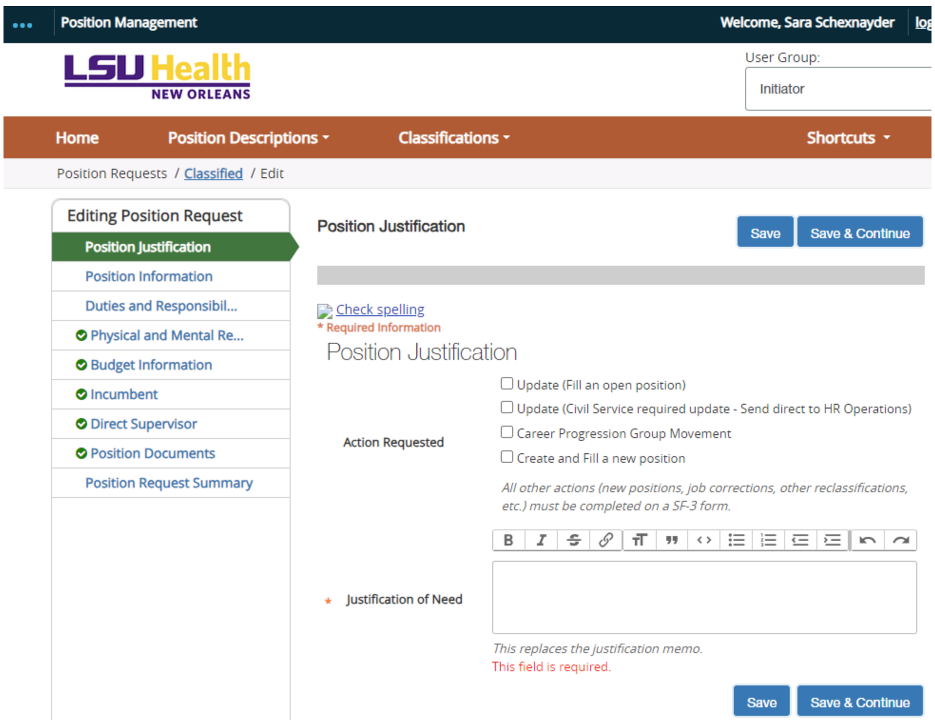
4. Enter the desired **System Job Title *** into the field.

5. The Organizational Unit information will default onto the page based on your user access. If you have responsibilities for more than one department, you will then select from the drop down list.

6. Click the **Start Position Request** button.

7. In the **Position Justification Section,** Click the appropriate box for the **Action Requested**.

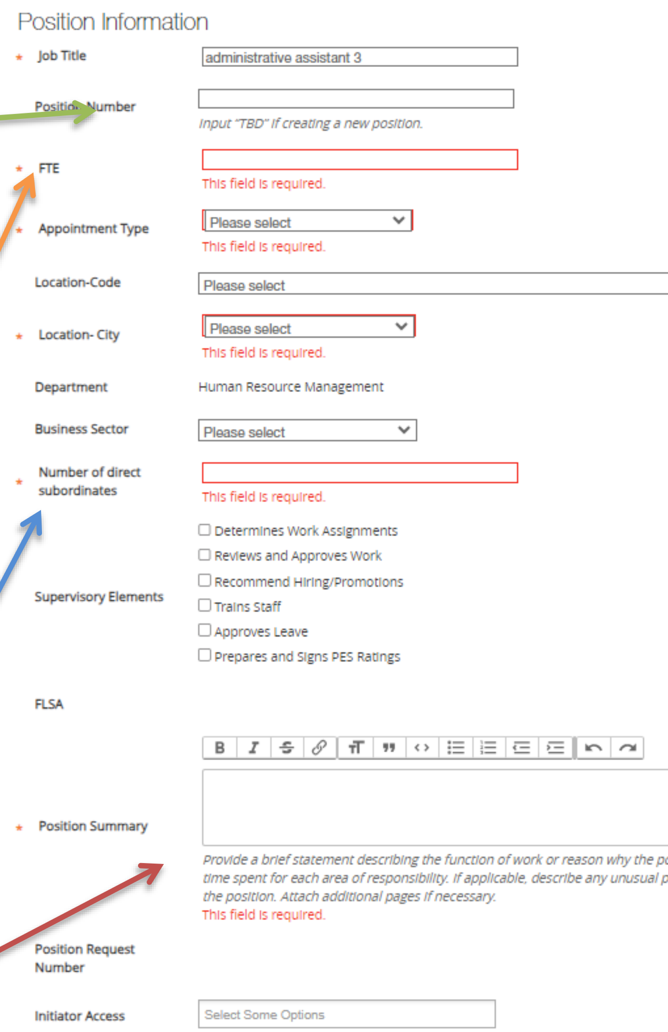
NOTE: The remaining steps are the same whether creating a new position description or modifying or cloning an existing one.



8. Enter the rationale for the new position into the **Justification of Need** field. This replaces the Justification Memo previously required. More details may also be included as an attached document.

9. Click the **Next >>** button to move to the next screen.

10. Complete the **Position Information Section** with the basic demographic data about the position you are creating.



The Position Number will be assigned by the system later in the process if you are creating a new position description. Enter **'TBD**' when creating a new position description.

If the position is a 40 hour per week position, the FTE = 1. If the position is less than 40, the FTE is the positions hours per week divided by 40. It should be entered in decimal format (e.g., 0.25, 0.5, etc.)

Number of Direct reports should be the number of regular LSUHSC positions that report directly to this position.
Indirect reports are the number of regular LSUHSC positions that report to the direct reports.
Student workers, contractors, and other such positions should not be reported here.

NOTE: On Classified positions, Supervisory Elements of the position will need to be checked.

The Position Summary should be a few sentences, which describes the major purpose of the position.

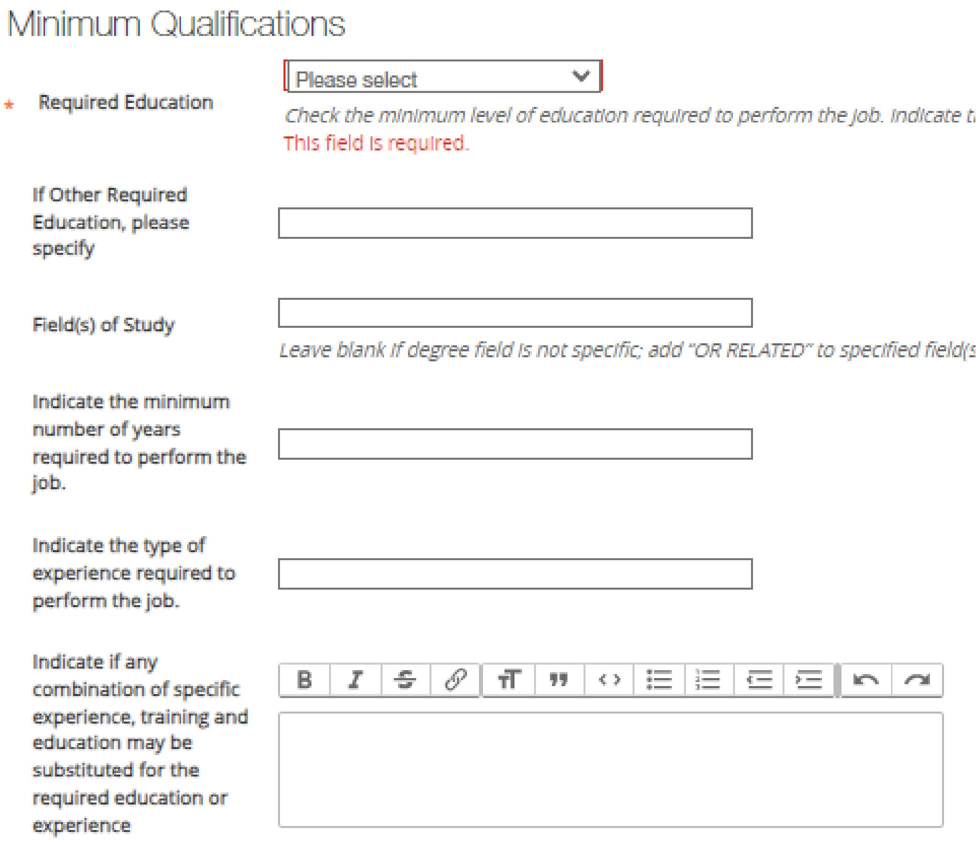
NOTE: This summary is used in position postings.

The Initiator Access field is an optional field where you can add the names of those people you wish to grant access to the Position Description (PD). No names are required to be added, but then no one else will be able to access the PD as initiator while it is in the approval process

11. The Minimum qualifications are next.

Minimum Qualifications are those attributes a candidate must possess to be considered for the position. Information listed here will be used to *screen out* applicants from consideration for employment.

For Classified positions, the minimum qualifications must match the Civil Service job specifications.

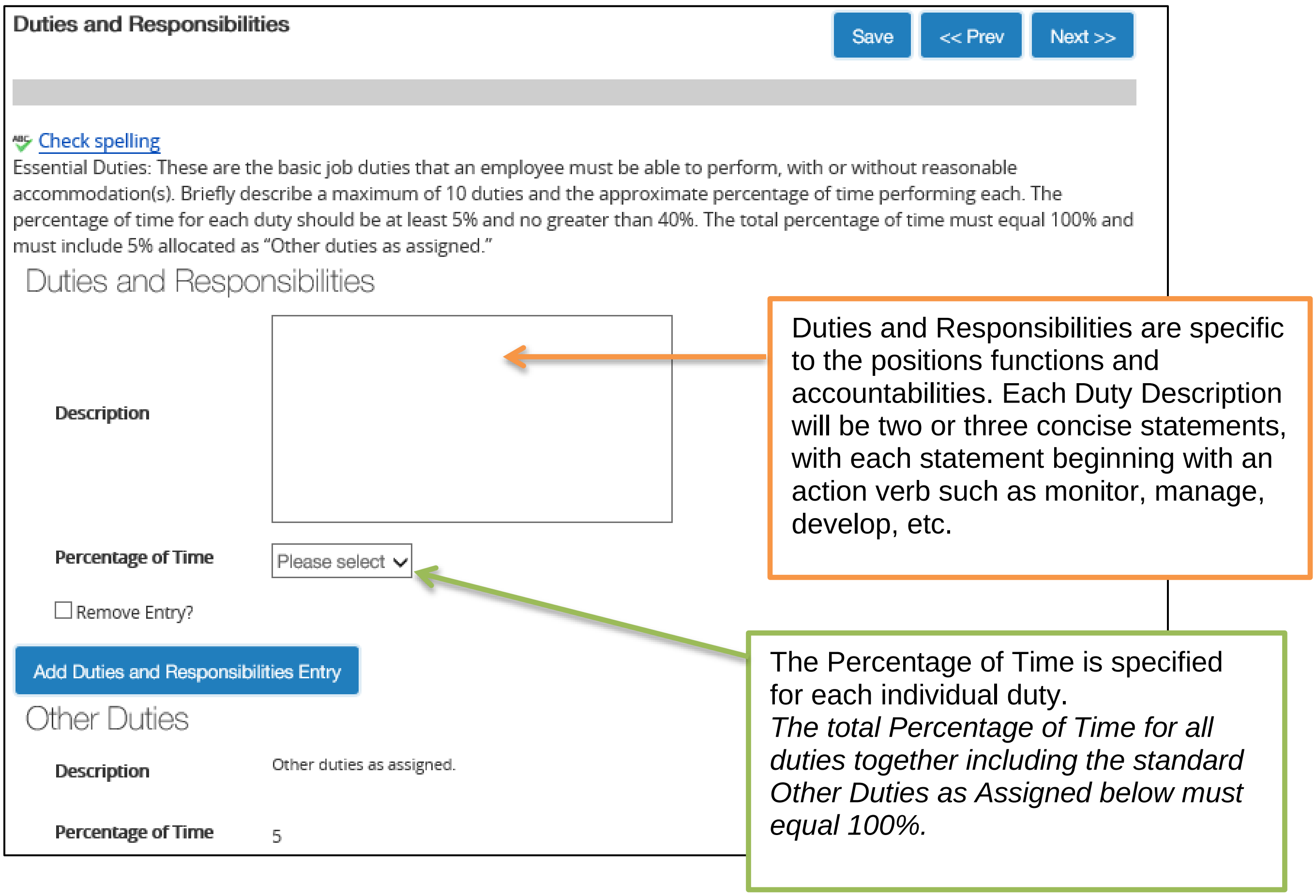


If substitution for the degree, discipline, certification, and/or years' experience can substitute, list specifically how this can be applied.

This must correspond to Civil Service job specifications.

12. The next section is **Duties and Responsibilities.** Enter up to ten duties and responsibilities with each accounting for between 5% and 90% of effort.

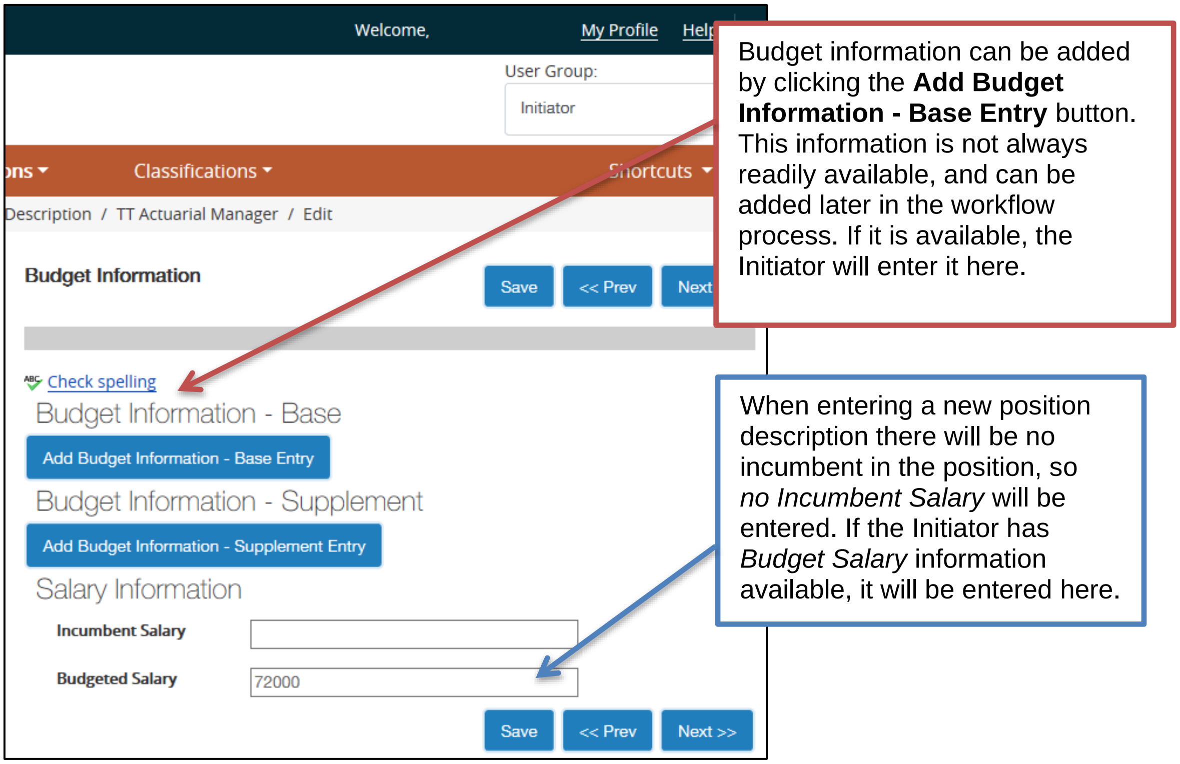
13. Click the **Add Duties and Responsibilities Entry** button.



14. **Physical and Mental Requirements Section** focus on what is needed to get the job accomplished. Use the drop down arrow to update from the preset minimally.

15. Scroll down the page you will find the **Essential Skills for Lab and Clinical** section. This section will primarily be utilized for those positions pertaining to labs or clinics if applicable.

17. Next, complete the **Budget Information Section**. As an alternative to entering the data on this screen, the department can complete a Funding Source Spreadsheet and attach it later in the **Position Documents** Section.

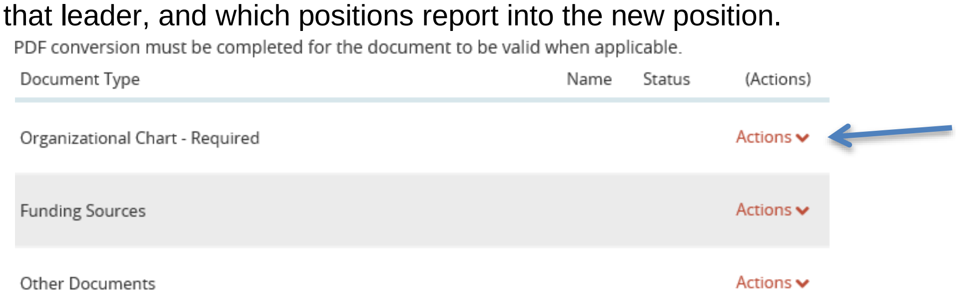


18. The **Incumbent** screen will display next. This should be left with the message that “This position description is vacant.”

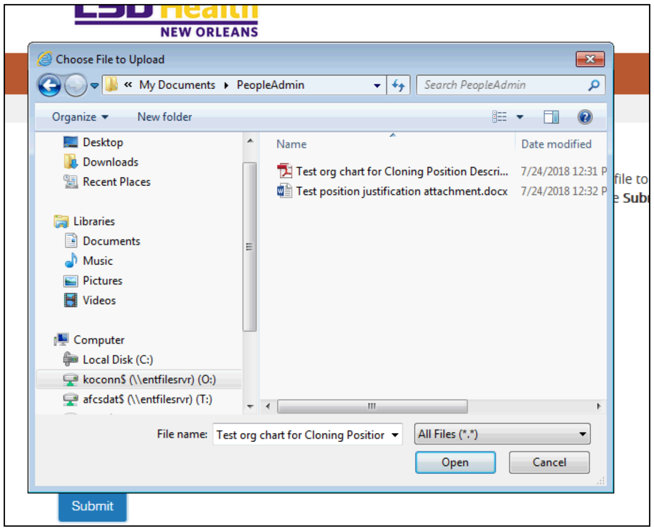
19. Next is the **Position Reports To** Section. You will select the ***Functional Position Title*** and employee the new position will report to. A list of active ***Position Titles with Position Number and Incumbent*** displays. If the correct Functional Position Title is not displayed, you can search for it using the **Position Descriptions - Filter these results** link.

20. Under the **Position Documents** Section, you should upload related documents.

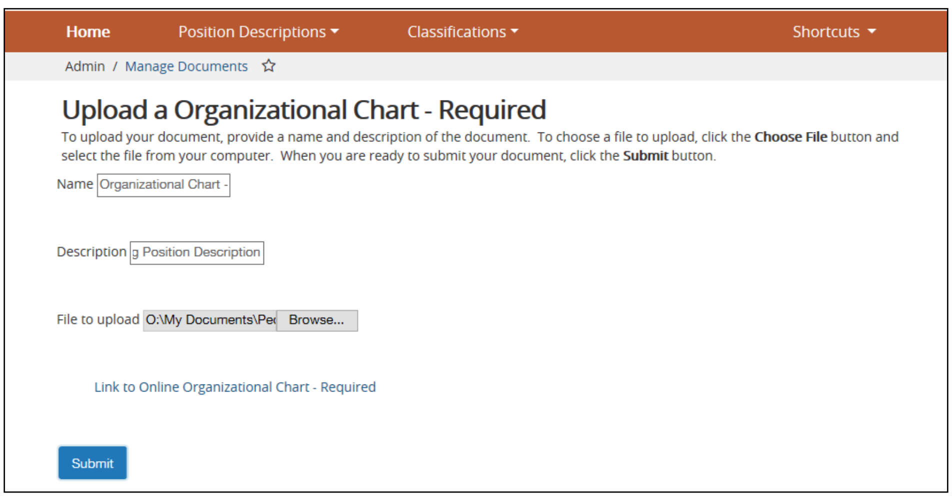
21. Hover over the **Action** link to upload documents. Select **Upload New**. The Organization Chart is required for all new positions. The organizational chart should contain at a minimum what position this will report to, what other positions report to that leader, and which positions report into the new position.



22. Enter the information into the **Description** field. Click the **Browse** button to select the file from your computer.



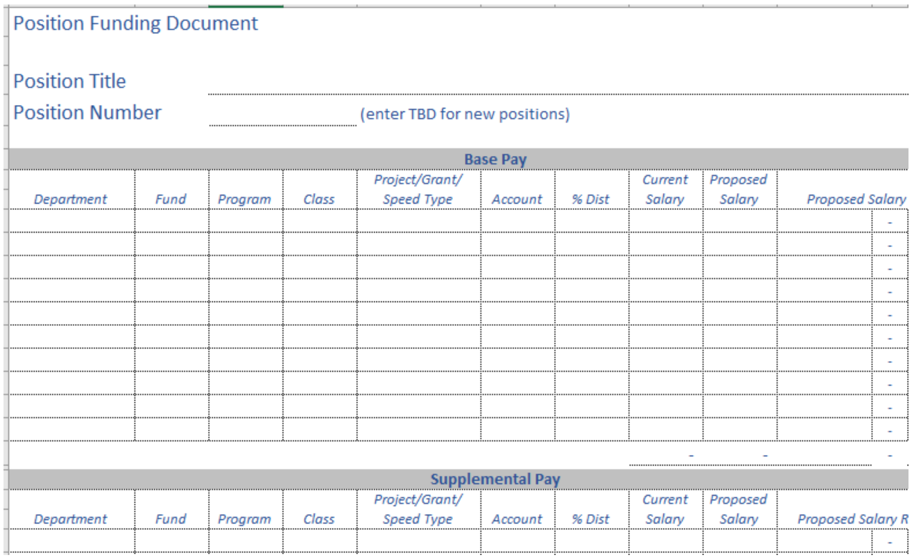
23. Click the **Open** button.



24. Click the **Submit** button.

25. Resignation Letters, separation emails or non-renewal notices should be included when replacing open or soon to be open positions.

26. The **Funding Sources** spreadsheet would be uploaded on this page if you elect not to enter the data on the Budget Information page.



Position Funding Document

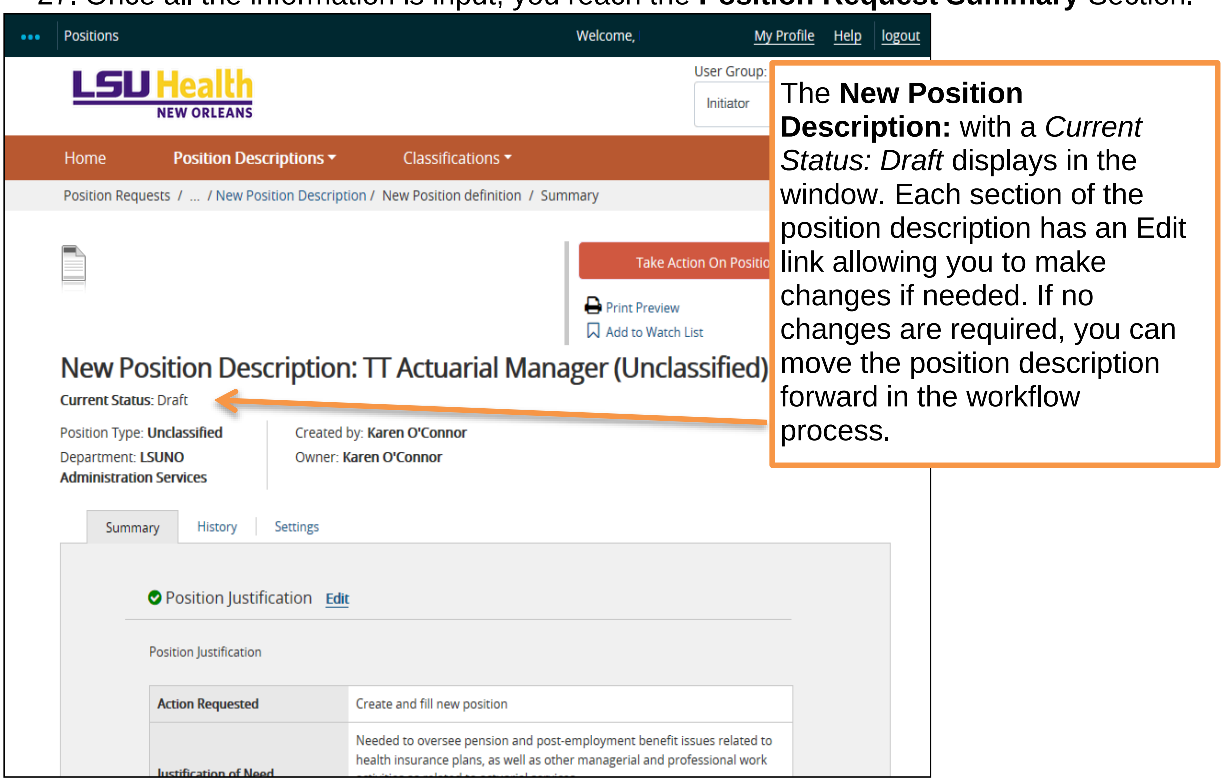
Position Title

Position Number (enter TBD for new positions)

Base Pay									
Department	Fund	Program	Class	Project/Grant/ Speed Type	Account	% Dist	Current Salary	Proposed Salary	Proposed Salary
									-
									-
									-
									-
									-
									-
									-
									-
									-
									-
							-	-	-

Supplemental Pay									
Department	Fund	Program	Class	Project/Grant/ Speed Type	Account	% Dist	Current Salary	Proposed Salary	Proposed Salary R
									-

27. Once all the information is input, you reach the **Position Request Summary** Section.



28. For new positions which have not been graded by compensation, the initiator can save the description in this state and notify compensation to begin an evaluation. This will allow the pay range to be finalized before budget and dean approval is obtained. Eliminating the need to go back for approvals if the salary range is changed.

29. ***NOTE: Make sure that all information on the position description is complete, with the possible exception of Budget and Compensation, before initiating the approval process.***
30. To take action, hover over the **Take Action On Position Request** button at the top right hand corner of the page and select one of the following:

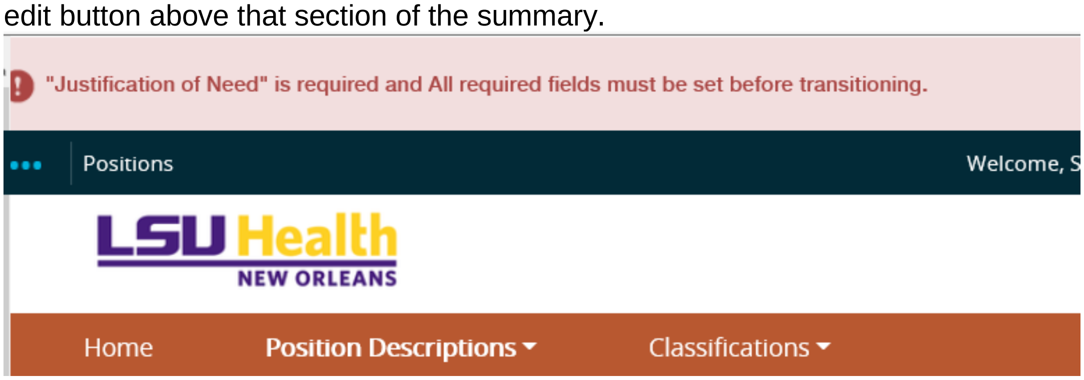
NOTE: Please note, to save this request and submit later, please select 'Keep working on this Position Request'. If there are additional approvers within the department, you will need to select the appropriate action per the workflow.

31. You will receive a pop up window 'Take Action' which will send an email in Outlook to the next approver to notify them they have an action pending. Please note, comments will be tied to the historical record of this action.

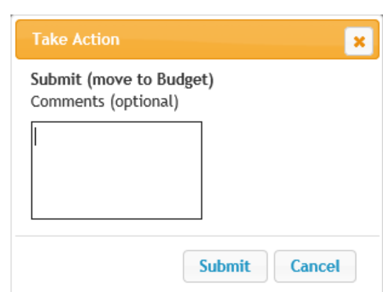
32. Click the 

Submit button.

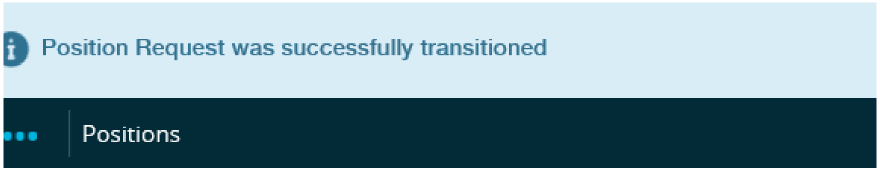
33. If any required fields were omitted, you will receive a pink band across the top of the screen notifying you of what updates are required. Go back to that section using the edit button above that section of the summary.



If the request was completed successfully, a pop up window will provide you an opportunity to add comments, which will be included in the email. Any comments will be saved in the position history. Click **Submit** to send to the next level.



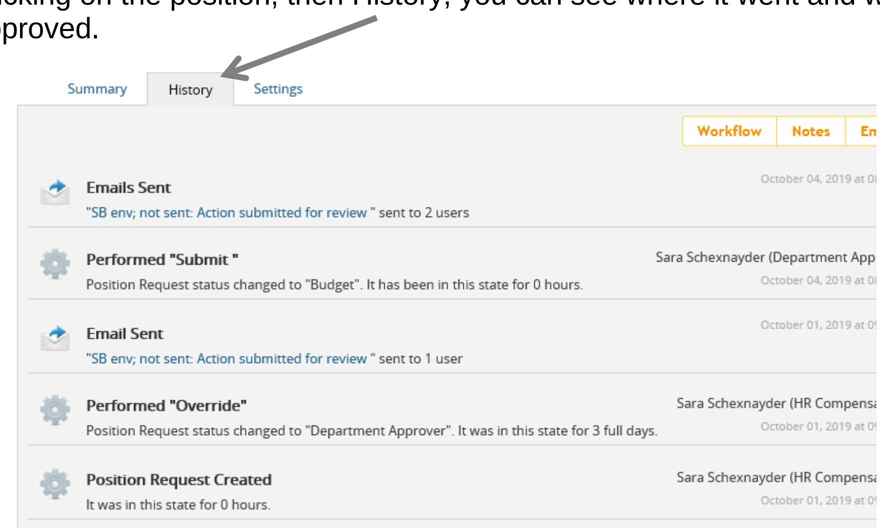
34. Once submitted, you will receive a blue band notifying you it has been transitioned.



35. You can follow the progress of the position approvals through the C**lassified Position Request** option.

Functional Position Title	Position Number	Position Request Number	Department	Position Request Name	Position Request Workflow State	Created Date	(Actions)
RESEARCH ASSOCIATE 1	00016585	U00001PR	Psychiatry	Modify Position Description: RESEARCH ASSOCIATE 1	Budget	October 01, 2019 at 09:30 AM	Actions

36. Clicking on the position, then History, you can see where it went and when each step approved.

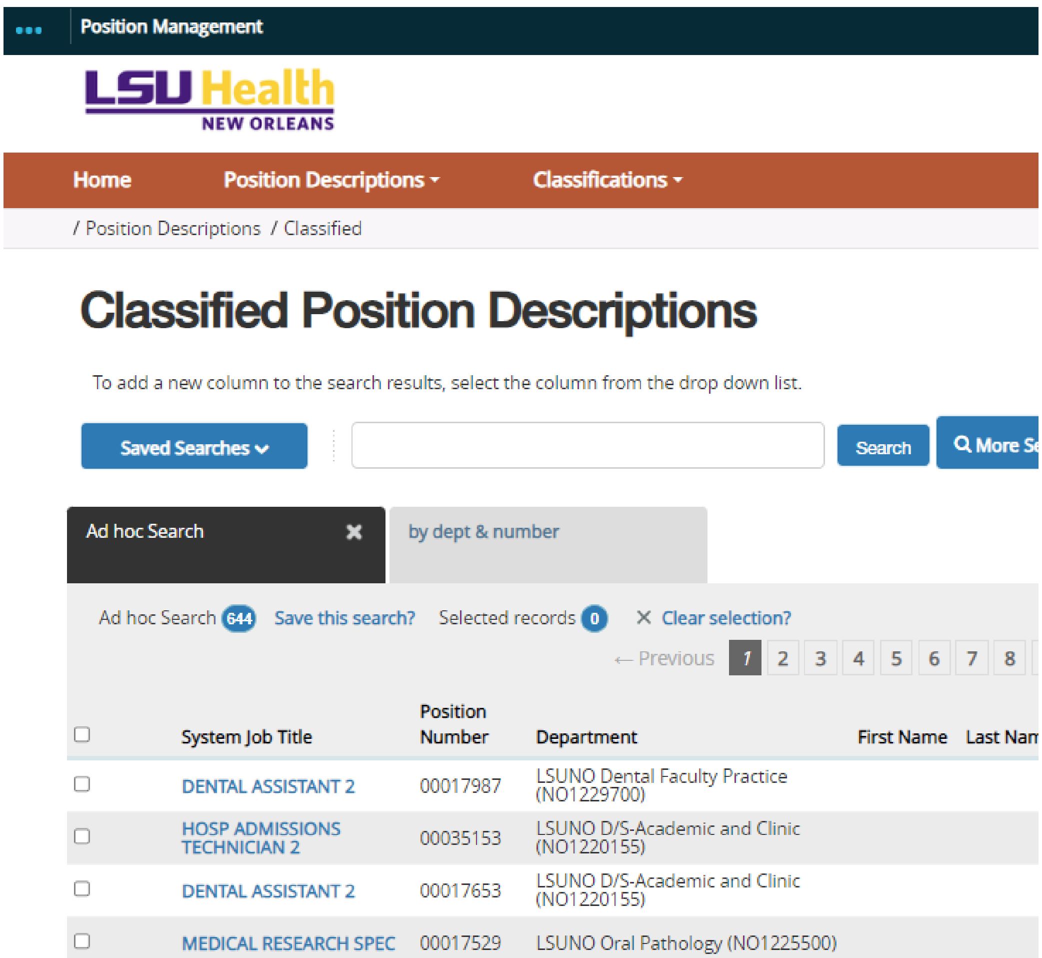


Modify Existing Position Description

This action is initiated to replace an open position, to update job duties for an existing position, or to request a re-evaluation of a position.

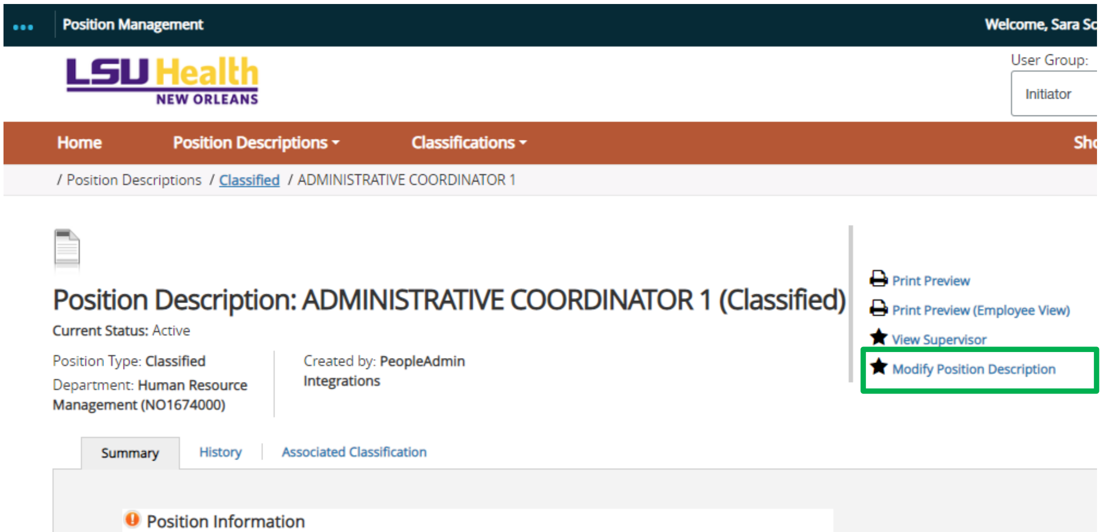
1. Click the **Position Descriptions** link.

2. Click the employee group link, for example "**Classified**".

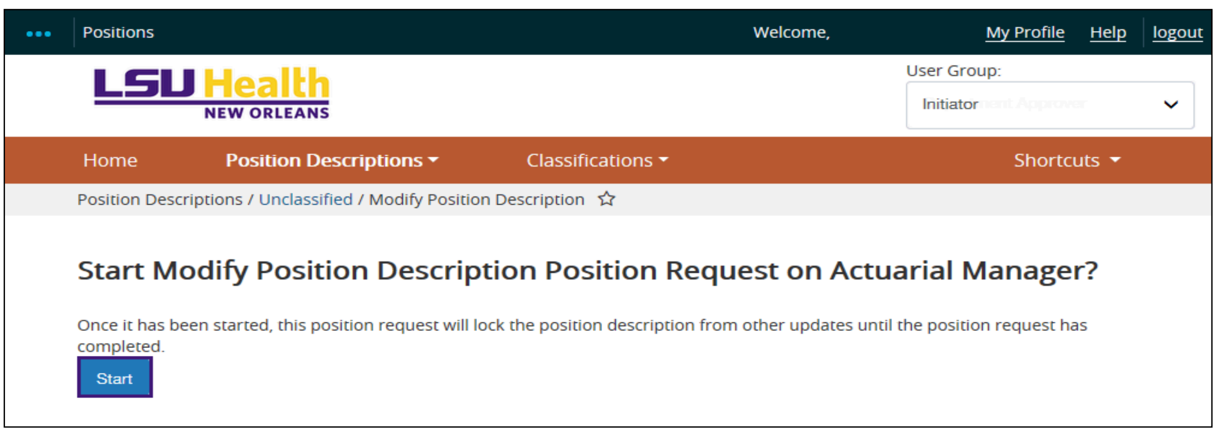


3. Enter the position title, position number, or incumbent name into the **Search** field and click the **Search** button.

4. Click the **Functional Position Title** for the position you wish to modify from the list. This will open the position description.



5. Click the **Modify Position Description** link.



6. Click the **Start** button. The warning message is not important; it just indicates the nightly feed from PeopleSoft to update the position will not continue when there is an open position request.

7. The rest of the processes continues just as a new position. Follow the steps starting with step 7 on page 4.

Clone Existing Position Description

This action is initiated to create a new position similar to an existing position. From an existing position description within your access, you can copy or 'clone' that position description. This will pull in pertinent information from the 'cloned' position description into this action and allow for edits. As an example, the work in the group has increased and leadership is requesting another Research Associate 1 position. If the position you want to duplicate is not within your span of control, contact the Compensation department for assistance. This should not be used to fill an open job where the position number and budget have already been established; use Modify the existing position in that case.

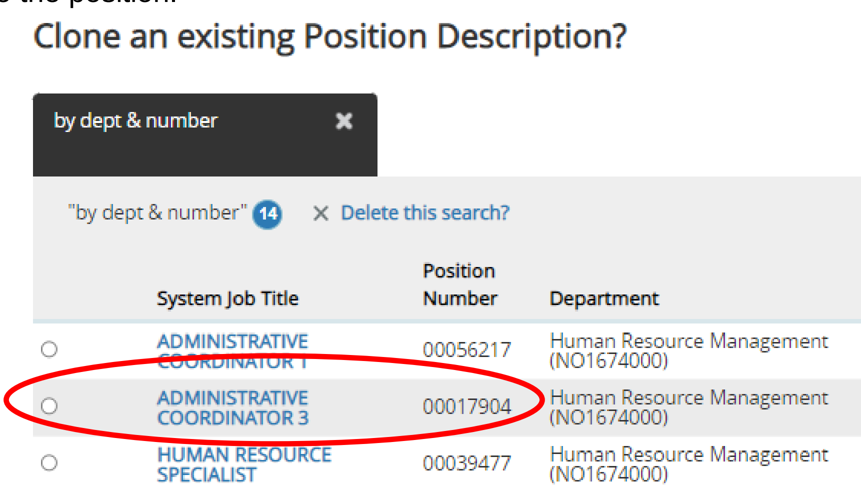
1. Click the 

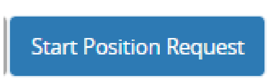
Position Descriptions link.

2. Click the employee group link.

3. Click the **Create New Position Description** link.


4. When cloning a position, leave the title and organizational information blank.

5. Use the Search feature or select a position to clone from the list. Click the circle next to the position.


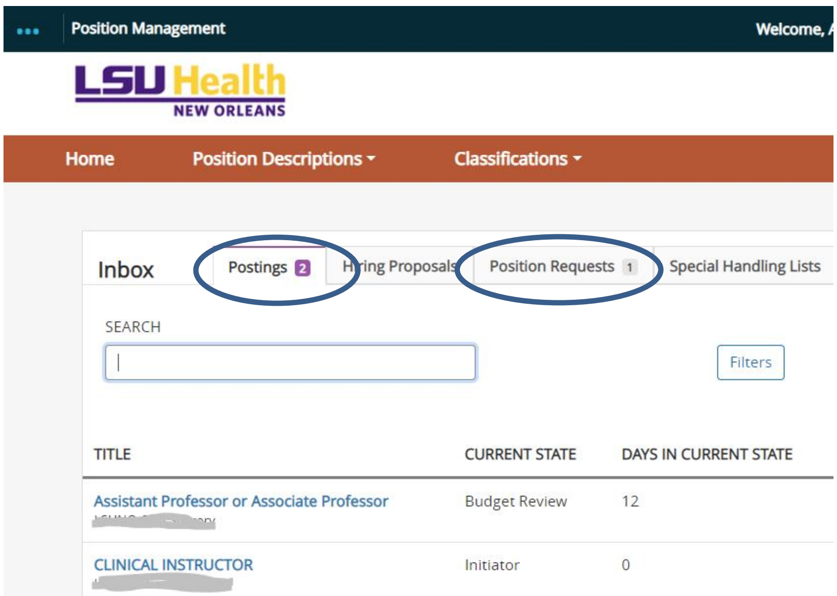
6. Click the **Start Position Request** button at the bottom of the screen.


7. Follow the steps as outlined for creating new positions starting at step 7 on page 4.

Approve a Position Description

You will receive an email, notifying you that a position description needs your approval. If you have multiple roles, you will want to note in the email what type of action needs your attention along with the position title. The easiest way to approve is to follow the link in the email to open the position needing your attention. .

If you prefer not to follow the link, you can also log into the system and see all the items needing your attention. In this example, there are two postings and one position request. Click on the title to move to the request. By clicking on the position title, you will be taken to the position needing your attention.

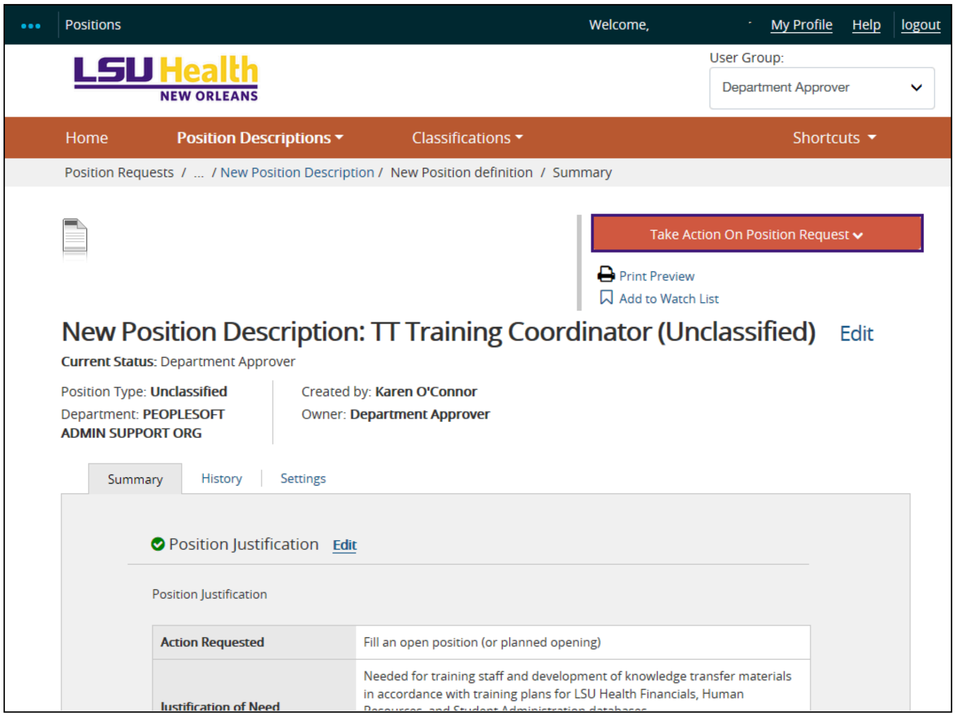


1. Before approving the position description, you must read through it and make sure that no additions or modifications are necessary. If the initiator modified an existing position, you will note on the summary in grey what the current position description reads. In this case the initiator changed the number of Direct reports from 4 to 6.

No. of Direct Reports to this Position	6 Currently: 4
No. of Indirect Reports to this Position	2 Currently: 0

2. If you find something needing to be changed, you have the ability to make changes or to send it back to the prior step to make changes. Each section has an **Edit** feature that will allow you to make changes within that section.
NOTE: You must click the Save button to save any additions or modifications made to a section.

3. Once satisfied with the position, click the **Take Action On Position Request** button.



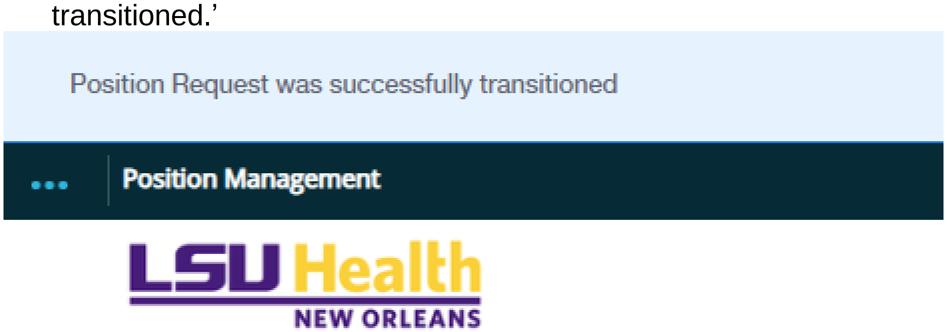
4. The *Workflow Actions* will display. The position description can be moved forward or backward through the process depending on what actions or modifications were taken or need to be taken. For this example, the position description will move forward through the process to Budget.

5. Click the **Submit (move to Budget)** link.

6. Comments may be added in the Comments box, but are not required.

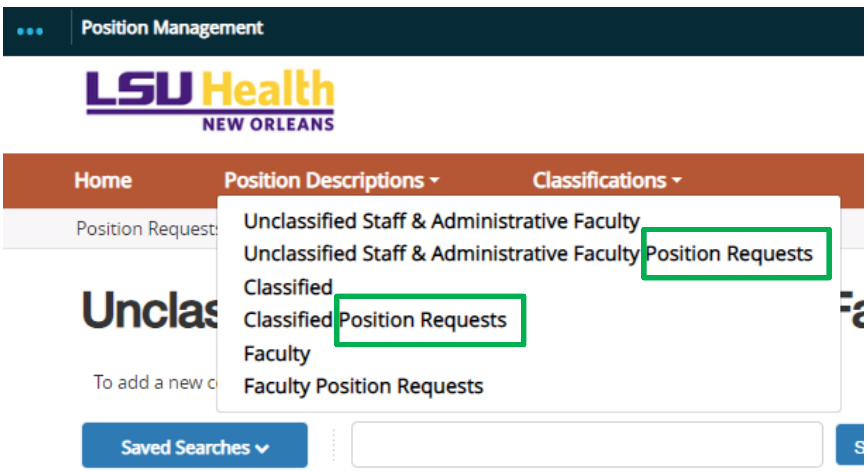
7. Click the **Submit** button.

8. A message will display at the top of the page 'Position request was successfully transitioned.'



View Status of Position Description Request

1. Click the **Main Menu** button. (three dots on upper left)
2. Click the **Position Management** button.
3. Select the appropriate **User Group:** from the list.
4. Click the **Position Descriptions** link.
5. Click the **…. Position Requests** link.



6. Enter the desired title into the **Search Keyword** field.
7. Click the **Search** button.
8. The Workflow Status will let you know where it is in the process.
9. To view the current description, click on the title.
10. The "History" tab will let you know who where it is in the process