



PeopleAdmin Classified Position Management

Version Date: August 2023

Training Guide
Position Management

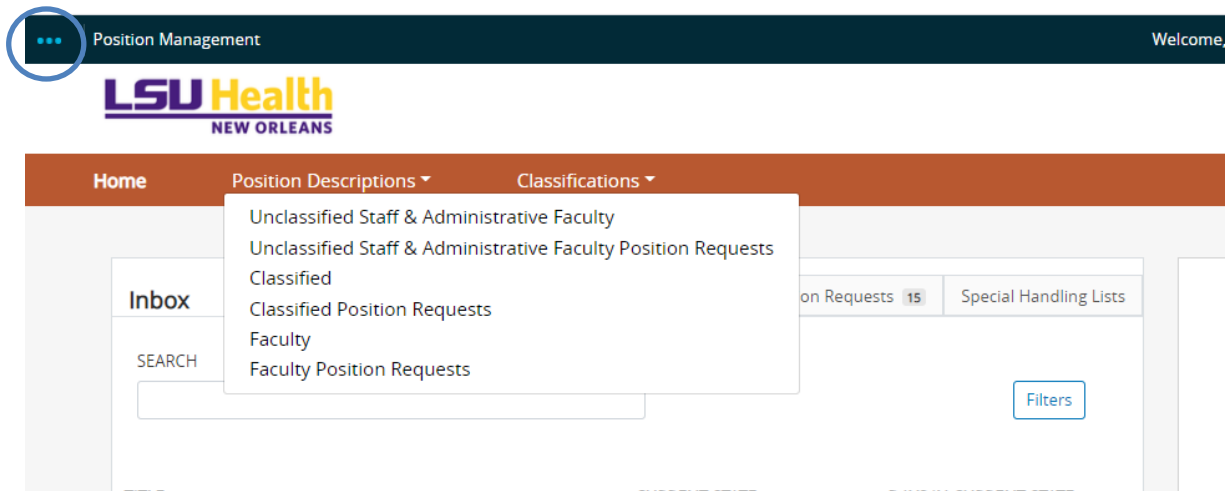
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For questions on Position Management, contact the Compensation Department at NOHRMCompensation@lsuhsc.edu.

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.



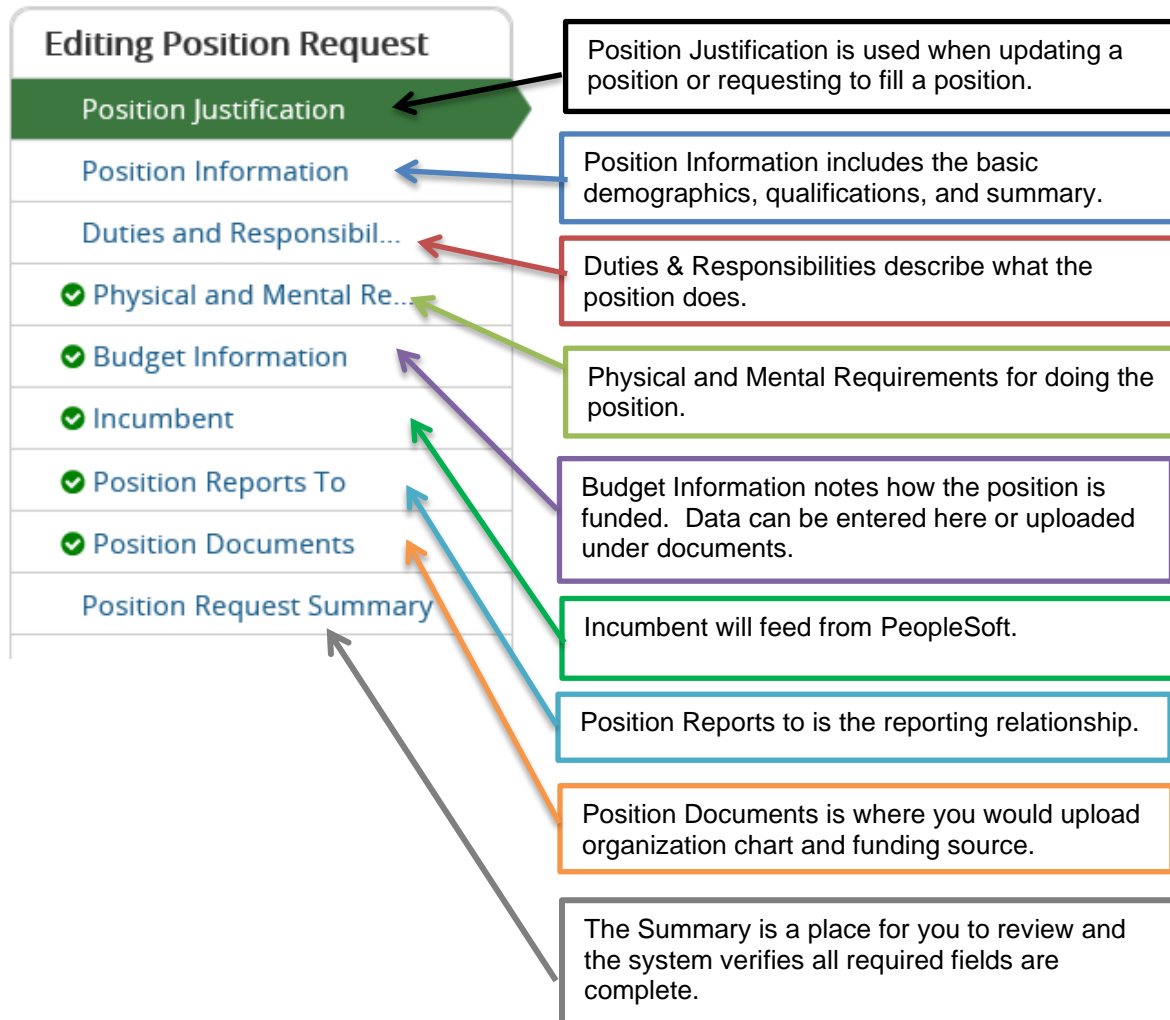
Position Management maintains position descriptions on classified, unclassified, and faculty positions.

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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.

Position Descriptions ▾

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

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

+ Create New Position Description

The screenshot displays the 'Position Management' web application interface. At the top, there is a dark blue header with 'Position Management' on the left and 'Welcome, Sara Schexnay' on the right. Below the header is the 'LSU Health NEW ORLEANS' logo. A navigation bar contains 'Home', 'Position Descriptions', 'Classifications', and 'Shortcuts'. The breadcrumb trail shows 'Position Descriptions > Classified > New Position Description'. The main content area features a 'New Position Description' section with a document icon, a 'Cancel' button, and a 'Start Position Request' button. Below this is a heading: 'To create a new Position Description, select a title and Organizational Unit. Select a Position Description below to clone from an existing Position Description.' The form includes a 'System Job Title *' field, an 'Organizational Unit' section with 'Lead Department *' and 'Department *' dropdown menus, and a search bar at the bottom with 'Saved Searches', 'Search', and 'More Search Options' buttons.

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

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- 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.

Start Position Request

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

- 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.

The screenshot displays the 'Position Management' web application interface. At the top, there is a navigation bar with 'Position Management' on the left and 'Welcome, Sara Schexnayder' on the right. Below this is the 'LSU Health NEW ORLEANS' logo and a 'User Group' dropdown menu set to 'Initiator'. A secondary navigation bar contains 'Home', 'Position Descriptions', 'Classifications', and 'Shortcuts'. The main content area is titled 'Position Requests / Classified / Edit'. On the left, a sidebar menu for 'Editing Position Request' includes 'Position Justification' (highlighted), 'Position Information', 'Duties and Responsibil...', 'Physical and Mental Re...', 'Budget Information', 'Incumbent', 'Direct Supervisor', 'Position Documents', and 'Position Request Summary'. The main area is titled 'Position Justification' and features a 'Check spelling' icon and a '* Required Information' label. Under 'Action Requested', there are four checkboxes: 'Update (Fill an open position)', 'Update (Civil Service required update - Send direct to HR Operations)', 'Career Progression Group Movement', and 'Create and Fill a new position'. A note states: 'All other actions (new positions, job corrections, other reclassifications, etc.) must be completed on a SF-3 form.' Below this is a rich text editor with a toolbar and a 'Justification of Need' text area. A red asterisk indicates this field is required. At the bottom right, there are 'Save' and 'Save & Continue' buttons.

- 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.

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

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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

Position Information

* Job Title

Position Number

Input "TBD" if creating a new position.

* FTE

This field is required.

* Appointment Type

This field is required.

Location-Code

* Location- City

This field is required.

Department

Business Sector

* Number of direct subordinates

This field is required.

Supervisory Elements

- Determines Work Assignments
- Reviews and Approves Work
- Recommend Hiring/Promotions
- Trains Staff
- Approves Leave
- Prepares and Signs PES Ratings

FLSA

* Position Summary

Provide a brief statement describing the function of work or reason why the position exists. Provide a brief statement describing the function of work or reason why the position exists. Provide a brief statement describing the function of work or reason why the position exists. Provide a brief statement describing the function of work or reason why the position exists. Provide a brief statement describing the function of work or reason why the position exists. Attach additional pages if necessary.

This field is required.

Position Request Number

Initiator Access

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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.

Minimum Qualifications


* Required Education 
Check the minimum level of education required to perform the job. Indicate t
This field is required.

If Other Required Education, please specify

Field(s) of Study
Leave blank if degree field is not specific; add "OR RELATED" to specified field(s)

Indicate the minimum number of years required to perform the job.

Indicate the type of experience required to perform the job.

Indicate if any combination of specific experience, training and education may be substituted for the required education or experience


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.

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- The next section is **Duties and Responsibilities**. Enter up to ten duties and responsibilities with each accounting for between 5% and 90% of effort.
- Click the **Add Duties and Responsibilities Entry** button.

Duties and Responsibilities Save << Prev Next >>

[Check spelling](#)

Essential Duties: These are the basic job duties that an employee must be able to perform, with or without reasonable accommodation(s). Briefly describe a maximum of 10 duties and the approximate percentage of time performing each. The percentage of time for each duty should be at least 5% and no greater than 40%. The total percentage of time must equal 100% and must include 5% allocated as "Other duties as assigned."

Duties and Responsibilities

Description	<input type="text"/>
Percentage of Time	Please select <input type="button" value="v"/>
<input type="checkbox"/> Remove Entry?	

Other Duties

Description	Other duties as assigned.
Percentage of Time	5

Callout 1 (Orange): Duties and Responsibilities are specific to the positions functions and accountabilities. Each Duty Description will be two or three concise statements, with each statement beginning with an action verb such as monitor, manage, develop, etc.

Callout 2 (Green): The Percentage of Time is specified for each individual duty. *The total Percentage of Time for all duties together including the standard Other Duties as Assigned below must equal 100%.*

- 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.
- 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.

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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**.

Budget information can be added by clicking the **Add Budget Information - Base Entry** button. This information is not always readily available, and can be added later in the workflow process. If it is available, the Initiator will enter it here.

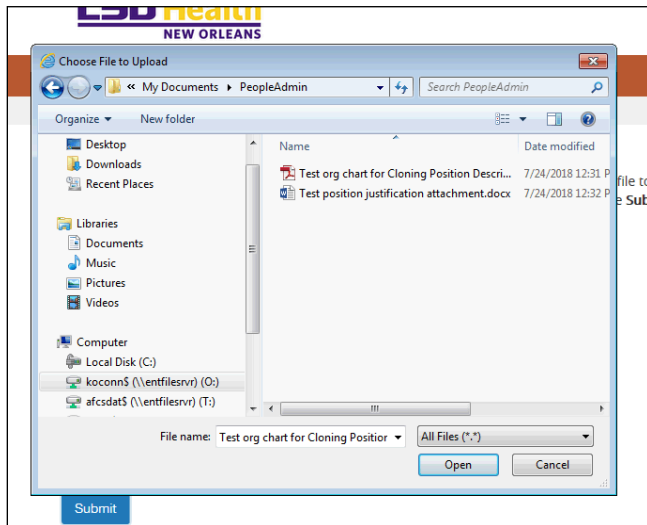
When entering a new position description there will be no incumbent in the position, so *no Incumbent Salary* will be entered. If the Initiator has *Budget Salary* information available, it will be entered here.

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.

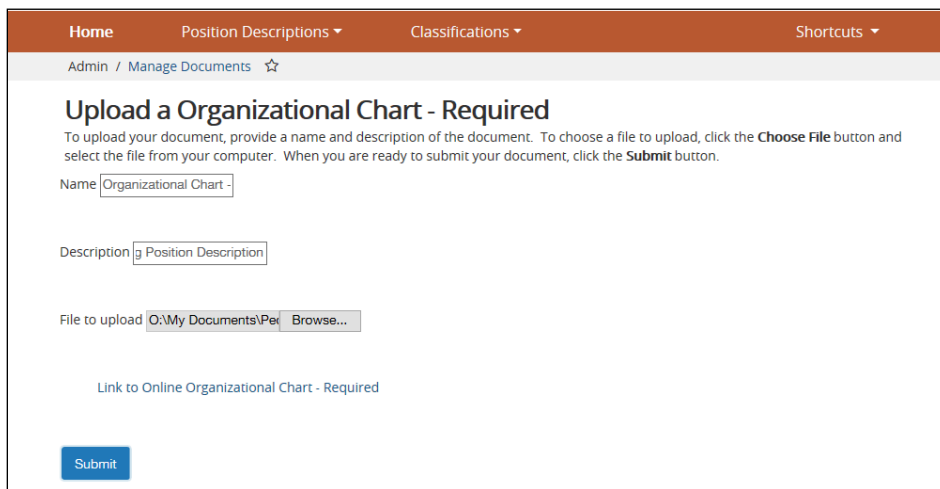
PDF conversion must be completed for the document to be valid when applicable.

Document Type	Name	Status	(Actions)
Organizational Chart - Required			Actions ▾
Funding Sources			Actions ▾
Other Documents			Actions ▾

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

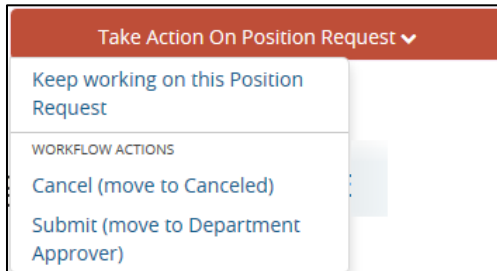


23. Click the **Open** button.

A screenshot of a web form titled 'Upload a Organizational Chart - Required'. The form has a header with 'Home', 'Position Descriptions', 'Classifications', and 'Shortcuts'. Below the header is a breadcrumb 'Admin / Manage Documents'. The main content area has a title 'Upload a Organizational Chart - Required' and a paragraph of instructions. There are three input fields: 'Name' with the value 'Organizational Chart', 'Description' with the value 'Position Description', and 'File to upload' with the value 'O:\My Documents\Pe...'. There is a 'Browse...' button next to the 'File to upload' field. Below the fields is a link 'Link to Online Organizational Chart - Required'. At the bottom is a 'Submit' button.

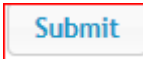
24. Click the **Submit** button.
25. Resignation Letters, separation emails or non-renewal notices should be included when replacing open or soon to be open positions.
26. The **Funding Sources** spreadsheet would be uploaded on this page if you elect not to enter the data on the Budget Information page.

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:

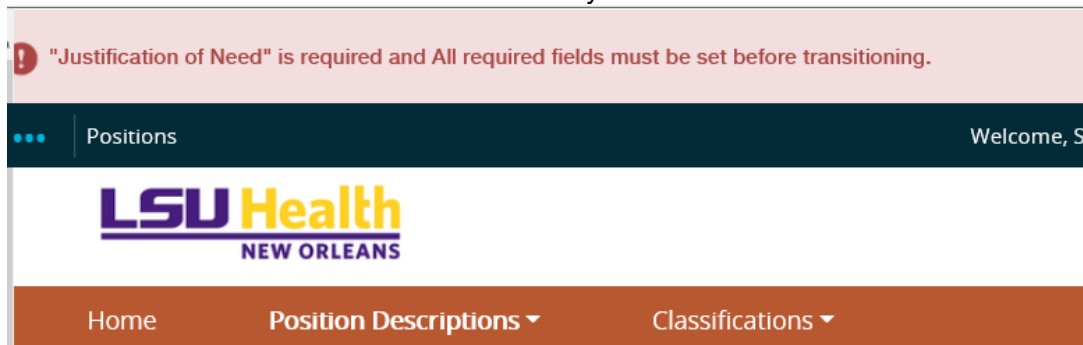


NOTE: Please note, to save this request and submit later, please select 'Keep working on this Position Request'. If there are additional approvers within the department, you will need to select the appropriate action per the workflow.

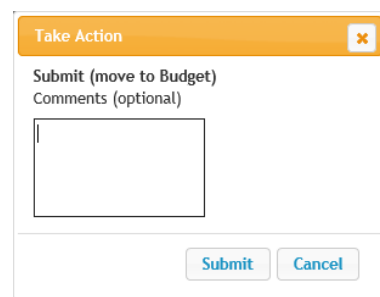
31. You will receive a pop up window 'Take Action' which will send an email in Outlook to the next approver to notify them they have an action pending. Please note, comments will be tied to the historical record of this action.

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.



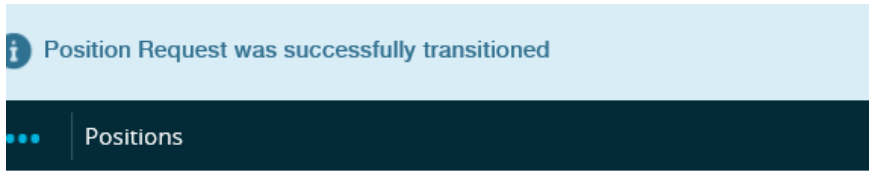
If the request was completed successfully, a pop up window will provide you an opportunity to add comments, which will be included in the email. Any comments will be saved in the position history. Click **Submit** to send to the next level.



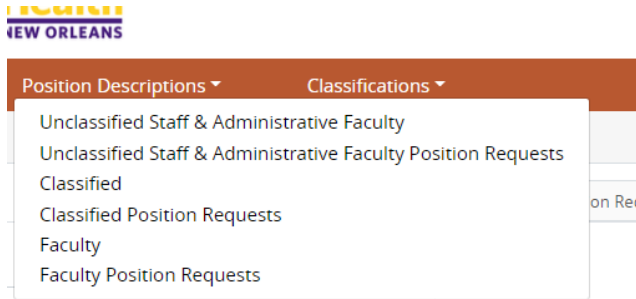
34. Once submitted, you will receive a blue band notifying you it has been transitioned.

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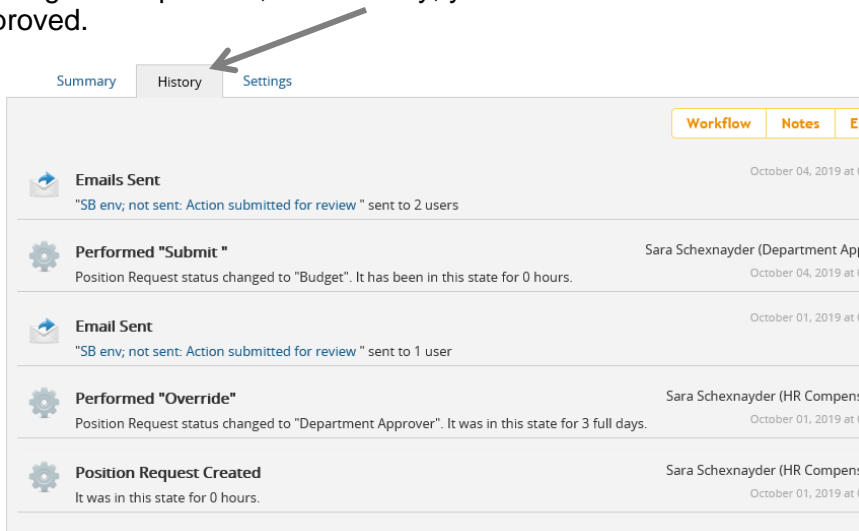


35. You can follow the progress of the position approvals through the **Classified Position Request** option.



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.

Position Descriptions ▾

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

The screenshot shows the 'Position Management' interface for 'Classified' positions. It includes a navigation bar with 'Home', 'Position Descriptions', and 'Classifications'. Below the navigation bar, there is a search area with a 'Saved Searches' dropdown, a search input field, and 'Search' and 'More Search' buttons. A table titled 'Classified Position Descriptions' is displayed, showing a list of positions with columns for 'System Job Title', 'Position Number', 'Department', 'First Name', and 'Last Name'. The table contains four rows of data.

<input type="checkbox"/>	System Job Title	Position Number	Department	First Name	Last Name
<input type="checkbox"/>	DENTAL ASSISTANT 2	00017987	LSUNO Dental Faculty Practice (NO1229700)		
<input type="checkbox"/>	HOSP ADMISSIONS TECHNICIAN 2	00035153	LSUNO D/S-Academic and Clinic (NO1220155)		
<input type="checkbox"/>	DENTAL ASSISTANT 2	00017653	LSUNO D/S-Academic and Clinic (NO1220155)		
<input type="checkbox"/>	MEDICAL RESEARCH SPEC	00017529	LSUNO Oral Pathology (NO1225500)		

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.

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The screenshot shows the 'Position Management' interface. At the top, there is a dark blue header with 'Position Management' on the left and 'Welcome, Sara Sc' on the right. Below the header is the 'LSU Health NEW ORLEANS' logo. A navigation bar contains 'Home', 'Position Descriptions', and 'Classifications'. The breadcrumb trail reads '/ Position Descriptions / Classified / ADMINISTRATIVE COORDINATOR 1'. The main content area displays 'Position Description: ADMINISTRATIVE COORDINATOR 1 (Classified)'. Below this, there are tabs for 'Summary', 'History', and 'Associated Classification'. A 'Position Information' section is visible. On the right side, there is a vertical menu with options: 'Print Preview', 'Print Preview (Employee View)', 'View Supervisor', and 'Modify Position Description'. The 'Modify Position Description' link is highlighted with a green box.


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

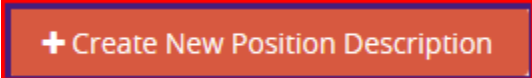
The screenshot shows a dialog box titled 'Start Modify Position Description Position Request on Actuarial Manager?'. The dialog box contains the following text: 'Once it has been started, this position request will lock the position description from other updates until the position request has completed.' Below the text is a blue 'Start' button. The background shows the 'Positions' interface with a breadcrumb trail: 'Position Descriptions / Unclassified / Modify Position Description'. The top navigation bar includes 'Home', 'Position Descriptions', 'Classifications', and 'Shortcuts'. The top right corner has 'Welcome,' and links for 'My Profile', 'Help', and 'logout'. The 'User Group' dropdown is set to 'Initiator'.

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

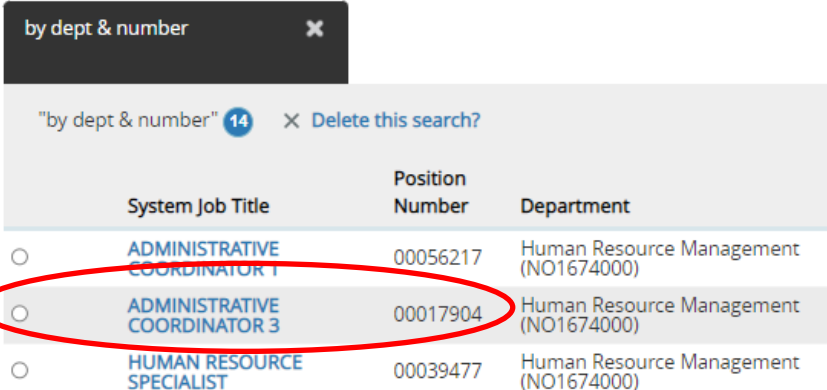
This action is initiated to create a new position similar to an existing position. From an existing position description within your access, you can copy or 'clone' that position description. This will pull in pertinent information from the 'cloned' position description into this action and allow for 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.



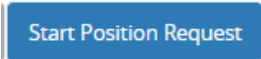
4. When cloning a position, leave the title and organizational information blank.
5. Use the Search feature or select a position to clone from the list. Click the circle next to the position.

Clone an existing Position Description?



	System Job Title	Position Number	Department
<input type="radio"/>	ADMINISTRATIVE COORDINATOR 1	00056217	Human Resource Management (NO1674000)
<input type="radio"/>	ADMINISTRATIVE COORDINATOR 3	00017904	Human Resource Management (NO1674000)
<input type="radio"/>	HUMAN RESOURCE SPECIALIST	00039477	Human Resource Management (NO1674000)

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.

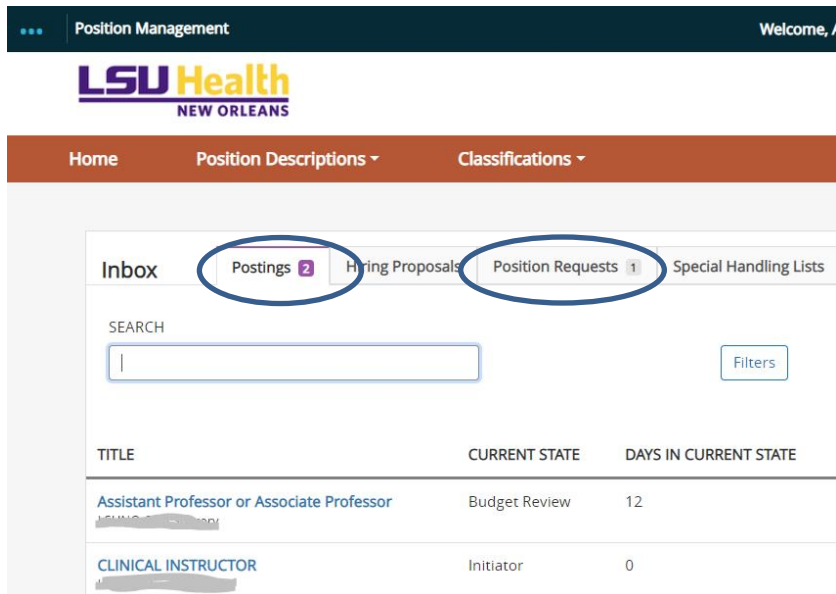
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Approve a Position Description

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.

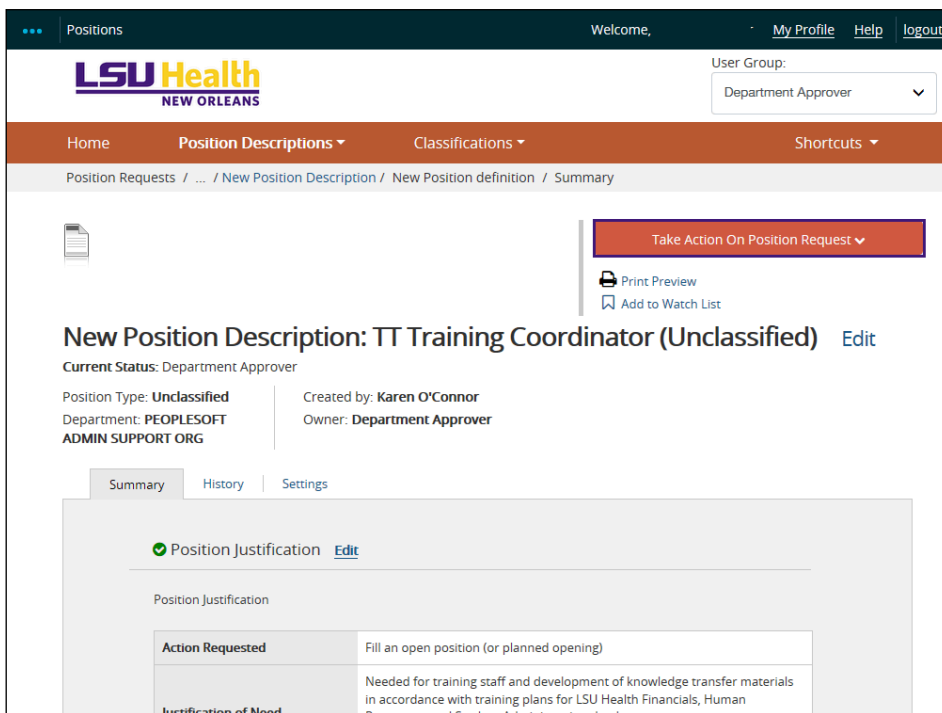


1. Before approving the position description, you must read through it and make sure that no additions or modifications are necessary. If the initiator modified an existing position, you will note on the summary in grey what the current position description reads. In this case the initiator changed the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

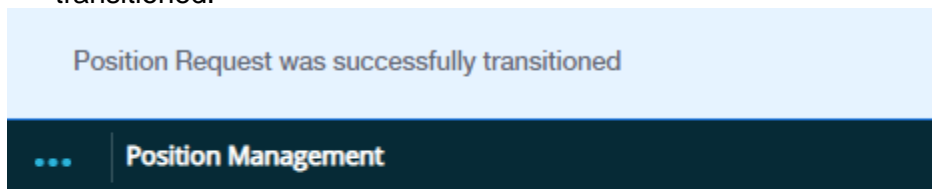
No. of Direct Reports to this Position	6 Currently: 4
No. of Indirect Reports to this Position	2 Currently: 0

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.'

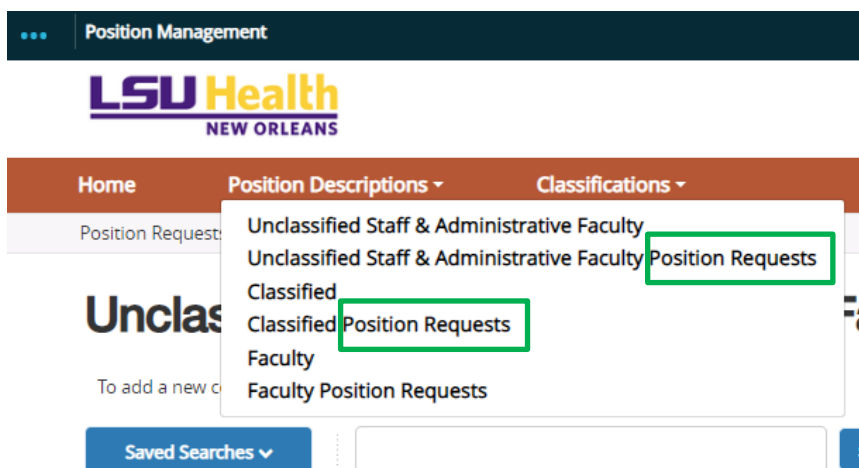


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View Status of Position Description Request

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

