ISU's Classification and Hiring System
PeopleAdmin 7 User Manual

Position Management

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What's New with PeopleAdmin 7 Job Aid

Purpose: The purpose of this job aid is to help you understand new features and updates relating to the PeopleAdmin 7 (PA7) implementation. In this job aid, you will find information regarding:

- **PeopleAdmin: Old to New**
- **PeopleAdmin 7 Enhancements**
- **Even more to look forward to…Electronic Letter of Intent (eLOI) and Onboarding**

PeopleAdmin: Old to New
Below is a comparison chart of current processes or terms and how they will change in PeopleAdmin 7.

PeopleAdmin 5.8	PeopleAdmin 7
Separate username and password from other ISU accounts	PA7 is integrated with your ISU email address (Net-ID) and password (for internal users only), which will contain multiple user groups when applicable
Add notes to explain what was changed in a Posting or Position	PA7 will automatically log a history of what data changed, when, and by whom in the history tab
Manually enter required information (qualifications, education, experience)	Classifications have required education, experience, and qualifications pre-populated (not-editable). P&S can enter supplemental required information to provide further clarification for a degree or experience (e.g., Bachelor of Science *in Ecology*)
Select Not Interviewed and department enters a comment explaining why not selected	Reasons will be utilized to aid with tracking and metrics, e.g. *Conflict of Interest, No Response to Email or Call, quality of education or experience*
Ability to route actions to any user on campus through status changes	Positions belong to one *Primary Employing Department,* which will take responsibility of the position and control the routing options through owners and workflows
Search active and pending actions to find postings and positions requiring your attention	An Inbox is now utilized to see active items assigned to you/your groups and a Watch List will display items you have decided to bookmark regardless of current owner
Personnel information Form (PIF) needed for preplanning or hiring process	The Hiring Proposal will replace this paper form.
Terminology	*For a complete list of terminology, view the People* **Admin Glossary** *on the PeopleAdmin project* ***website****.*
Notice of Vacancy (NOV)	Posting be the new terminology replacing the NOV. Posting number will replace Vacancy ID#.
Pre-Employment Monitoring Form (PEMF)	A Hiring Proposal (HP) will be created instead of a PEMF to request hire. The Hiring Proposal will be auto populated with information from the application.
Minimum (required) Qualifications and Preferred Qualifications	Faculty Positions have Required and Preferred Education and Experience P&S Positions have Required Education and Experience (non-editable) and Supplemental Required Education and Experience as well as Preferred Education and Experience. Merit Positions have Required/Special/ and Preferred Qualifications. All positions will have the opportunity to list required and/or preferred licensure(s) and certification(s).

What's New with PeopleAdmin 7 Job Aid

PeopleAdmin 7 Enhancements

PeopleAdmin 7 has an impressive list of enhancements compared to its predecessor, PeopleAdmin 5.8. The table below describes the category and enhancements users can expect in the new system.

Category	Description of Enhancements
Navigation and Feel	• Ability to use the back button of your browser • Ability to save/return to position descriptions, postings, hiring proposals, etc. • New print option for shortened PDs • Removed duplicate/unnecessary forms and fields • Action links are along the top navigation bar instead of the side page • New numbering system for postings and PDs to indicate position type • Americans with Disabilities Act (ADA) compliant
Automated Communications	• ISU customized email templates to notify a user an action is required • Automatic emails generated to an applicant (i.e., successful submission, position filled) • Ability to configure the system to send automated reference requests on a posting by posting basis when an applicant reaches a certain workflow status

Automatic Routing	• Actions are electronically moved through electronic routing instead of status selection
	• New routing and workflows by position type (i.e., Merit)
	• New user groups and organization structure have been established for routing:
	    ○ ISU
	    ○ Division (Senior VP/President, Provost)
	    ○ College/Unit (Dean /AVP)
	    ○ Department (Dept Chair/Director)
	    ○ Hiring Manager or Posting Admin

Searching	• Keyword searches work across text fields and attached documents on applicants • Ability to narrow supplemental questions by answers and search applicants through keyword searches
Supervisor and Employees	• Ability to connect a supervisor PD to the employee's Position Description (PD) • Faculty member can be noted as a supervisor to access PDs • Ease of updating supervisors
Reporting and Metrics	• Ability to create custom queries in addition to searches on demand • Specific reports available by user groups • Dropdowns instead of text fields (when available) on postings and PDs to allow for standardized reporting and metrics • Able to report on duration of posting, application, etc.

What's New with PeopleAdmin 7 Job Aid

Even More to Look Forward To… Electronic Letter of Intent and Onboarding
In addition to the new features and benefits of PeopleAdmin7, a team is working on creating an automated electronic Letter of Intent (eLOI). An eLOI workflow has been created in addition to the processing procedures. The eLOI will be triggered automatically after verbal negotiations with the candidate. The candidate has the opportunity to electronically sign and accept the eLOI. The posting admin will confirm the hire in PeopleAdmin7 and University Human Resources will finalize the hire so the new hire can start the onboarding process.

The Onboarding process for new hires is being updated to allow for a consistent new hire experience and ease in completing necessary forms.

Quick Reference Guide: How to Log into PeopleAdmin7

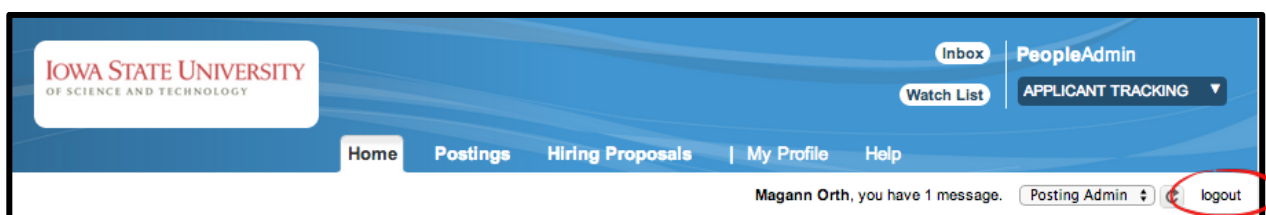**Instructions:** Use the following steps to log into ISU's Classification and Hiring System, PeopleAdmin7. You will need your ISU Net-ID and password to log in to the HR Portal. If you are unsure of your username/password, please contact the Solution Center (515-294-4000). Refer to **Understanding the PeopleAdmin Interface Job Aid** for more detailed descriptions.

1. Open a **web browser** (e.g. Internet Explorer, Safari, Firefox, Chrome).

2. **Navigate** to www.iastatejobs.com/hr.

3. Click the yellow link "**Please click here to log in with your ISU Net-ID**".

Iowa State University

Please click here to log in with your ISU NetID

As a user of the ISU Classification and Hiring system, I understand that I may have access to information related to applicants, employees, and university business transactions. I understand that this information is confidential and my ability to access and/or use this information is exclusively for conducting university business. I understand and agree that I shall not provide or release this information to any individual or organization except for the sole purpose of conducting university business within the requirements of my position. I understand that I will use this system in accordance with university policies. I understand that any misuse or inappropriate disclosure of such information could result in discipline. By continuing, I acknowledge that I understand and agree to these conditions.

4. Enter the first part of your **ISU Email address** as your Net-ID.

5. Enter your **email address password** in the password field.

6. Click **Login**.

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Single Sign–On for the Web

Login

Your "weblogin" session has expired. Please log in again or exit this browser to change Net-IDs.

Net-ID: netid
Password: ••••••••
Lifetime: 12 hours ⬍
Login

Forgot your password? | Register for a Net-ID

Solution Center, 195 Durham Center, (515) 294-4000, solution@iastate.edu.
Copyright © 2011, Iowa State University of Science and Technology. All rights reserved.

You are now logged into **PeopleAdmin 7**. To log out, click the link on the upper right hand side.

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Inbox | PeopleAdmin
Watch List | APPLICANT TRACKING ▼

Home | Postings | Hiring Proposals | My Profile | Help

Magann Orth, you have 1 message. | Posting Admin ⬍ | logout

Understanding the PeopleAdmin 7 Interface Job Aid

Purpose: The purpose of this Job Aid is to provide a basic overview of the ISU Classification and Hriing System, PeopleAdmin 7, screens and interface including module selection, user groups, inbox and more. A list of PeopleAdmin 7 (PA7) resources and training is also available.

How to Log In

There are two methods of logging into the Iowa State University Classification and Hiring System website: www.iastatejobs.com/hr.

| *ISU Net-ID Log In*		*Guest User Log In*
By clicking the **yellow link**, you will be asked to use your **net-id** *(i.e. first part of your ISU email address)* and **password** to log into PA7.	**Iowa State University** **Please click here to log in with your ISU NetID** As a user of the ISU Classification and Hiring system, I understand that I may have access to information related to applicants, employees, and university business transactions. I understand that this information is confidential and my ability to access and/or use this information is exclusively for conducting university business. I understand and agree that I shall not provide or release this information to any individual or organization except for the sole purpose of conducting university business within the requirements of my position. I understand that I will use this system in accordance with university policies. I understand that any misuse or inappropriate disclosure of such information could result in discipline. By continuing, I acknowledge that I understand and agree to these conditions.	If you are part of a **search committee** or are asked to review applicants, use your **provided** guest **username** and **password** to log in.

Understanding the PeopleAdmin 7 Interface Job Aid

Home Page
This section will describe the various aspects of the home page, such as the module selection, alerts and information, shortcuts and my links, and understanding user groups.

Module Selection
PeopleAdmin is organized by position descriptions and postings. There are three modules available within PeopleAdmin 7:
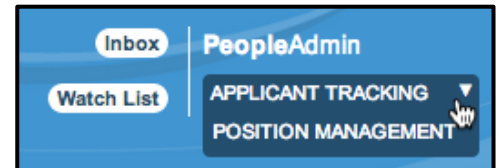
Module	Description
Applicant Tracking	This module is used to create a posting, review and rate applicants, and request and route a hiring proposal. After logging into PeopleAdmin, you will be taken to the applicant-tracking module.
Position Management	The position management module is a tool for managing position descriptions, initiating reclassifications, managing supervisors and viewing classifications for positions at ISU.
Admin	This module is only available to University Human Resources (UHR) and used to manage user permissions, email templates, and various forms and fields.

Alerts and Information
The alerts area will be used by UHR to notify users of important messages, such as a system maintenance schedule or important upcoming deadlines. An alert will show on the system homepage, as necessary. The alert will be removed centrally by the system administrator.
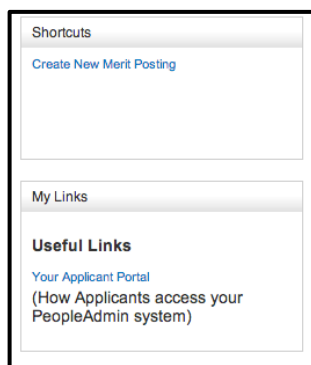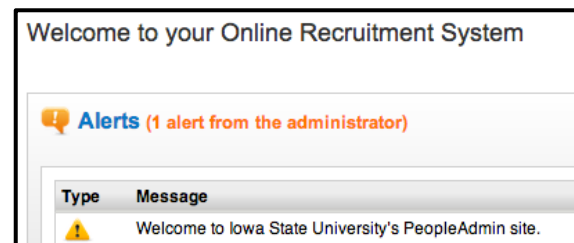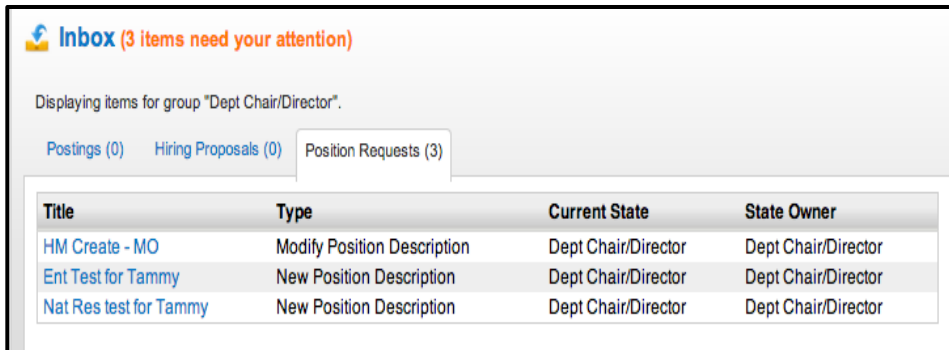
Shortcuts and My Links
This section provides useful links provided by the system administrator to training materials and a shortcut to the Applicant Portal.

# Understanding the PeopleAdmin 7 Interface Job Aid

Inbox

The Inbox is a notification area to display any items that you or those in your user group need to take action upon. The document will not continue in the workflow until you take an action (approve or return). There are three tabs: **Postings**, **Hiring Proposal**, and **Position Requests**. In the screenshot below, there are 3 position requests requiring action by the **State Owner** "Dept Chair/Director":
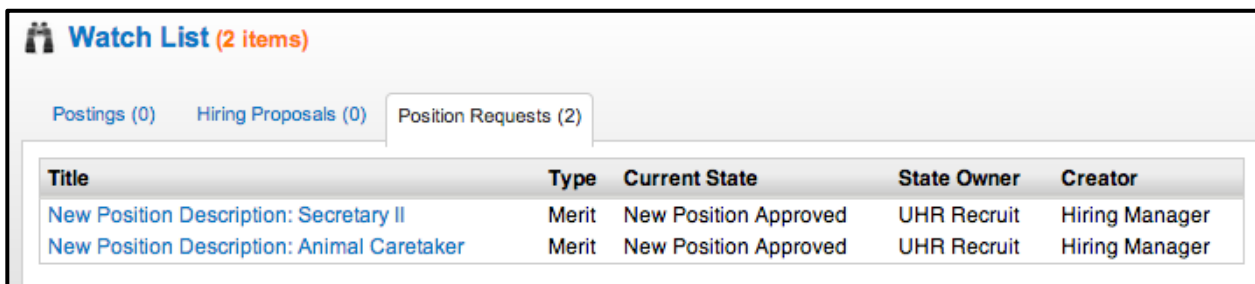
Inbox (3 items need your attention)

Displaying items for group "Dept Chair/Director".

Postings (0)   Hiring Proposals (0)   Position Requests (3)

Title	Type	Current State	State Owner
HM Create - MO	Modify Position Description	Dept Chair/Director	Dept Chair/Director
Ent Test for Tammy	New Position Description	Dept Chair/Director	Dept Chair/Director
Nat Res test for Tammy	New Position Description	Dept Chair/Director	Dept Chair/Director

The inbox and watch list can be accessed on your home page or on the upper right corner of the system:

Inbox	PeopleAdmin
Watch List	APPLICANT TRACKING ▼

Employee   logout
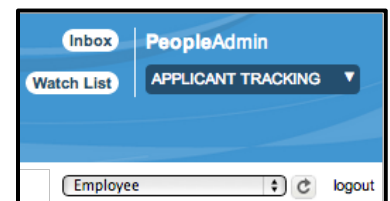
Watch List

The watch list shows the **current state and owner** of the requests that you have flagged to monitor after completing an action (eg. Route to UHR for Approval).

Watch List (2 items)

Postings (0)   Hiring Proposals (0)   Position Requests (2)

Title	Type	Current State	State Owner	Creator
New Position Description: Secretary II	Merit	New Position Approved	UHR Recruit	Hiring Manager
New Position Description: Animal Caretaker	Merit	New Position Approved	UHR Recruit	Hiring Manager

How to remove items from your watch list

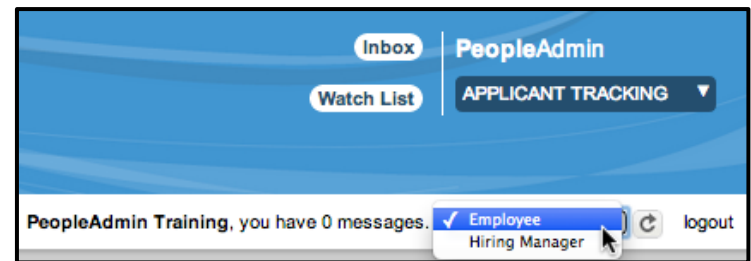After logging into the system, complete the following steps:

1. Click **Watch List** (on the upper right hand corner)
2. Hover over **Actions** and select **Stop Watching Posting.**

The item will be removed from your watch list.

Understanding the PeopleAdmin 7 Interface Job Aid

User Drop Down
To perform actions, you must have the appropriate user group **targeted or toggled**. After toggling groups, click the ↻ button to reload the current page.

Use the table below to guide you through the various roles and responsibilities of each user group.

User Group	Description
Employee	Able to view his/her PD and initiate a modification (reclassification or update) action.
Hiring Manager	Used to assign a person to view/edit a position description, typically the functional supervisor of the incumbent.
Posting Admin	The posting admin will manage the posting and applicants. For Faculty/Other and temporary postings, the posting admin will create the posting for fill. The posting admin will route postings for approval, rate and route applicants, and create a hiring proposal for the final candidate(s).
Dept/Director	Users will approve position descriptions (new, modifications, reclassifications), approve postings, review applicants, approve interview selections and approve hiring proposals.
Dean/AVP	
President/Senior VP	
Provost	
Search Committee Member	The search committee member group is used so those associated with the search, but not leading the search, can view applicant documents such as resume and application. The search committee also has the ability to rate applicants within the system.
UHR Only User Groups	
UHR Class and Comp	Classification and Compensation manages classifications, creates and approves new position descriptions, finalizes reclassification requests. UHR Recruitment may route Hiring Proposals to this user group for salary approval.
EO (Equal Opportunity)	EO will review and approve positions requiring a waiver of advertisement.
UHR Recruitment	UHR Recruitment will review position descriptions that are for fill, create postings and route to the posting admin for approval, approve interview requests and hiring proposals in addition to conducting background checks.
System Admin	The system administrator will assign new user groups to employees that have new or updated roles and responsibilities within the system.

Understanding the PeopleAdmin 7 Interface Job Aid

If you need access to additional user groups, please follow these steps:
1. Click **My Profile**
2. Hover over "**Take Action on User**" and click **Request Group Change**
3. Find the new group (i.e. Search Committee Member) and click **Request new group**
4. Select the **scope** (i.e. org unit and department) you would like this group to be tied to
5. Click **Request Group Assignment**

The User Groups page will now reflect that you have requested a user group. The request will be routed to UHR Recruitment and the System Administrators. You will be notified once your request is complete.

Resources for PeopleAdmin 7
The table below lists and describes other available resources for accessing and learning about PeopleAdmin:

Resource	Description
PeopleAdmin Website	peopleadmin.hrs.iastate.edu/
University Human Resources Website	www.hrs.iastate.edu
Recruitment Information for ISU Departments	http://www.hrs.iastate.edu/hrs/recruitment
Classification and Compensation Website	www.hrs.iastate.edu/hrs/classcomp
Provost	www.provost.iastate.edu

Understanding Your Profile Information Job Aid

Purpose: PeopleAdmin7 (PA7) configures a user profile for each employee at the University. Use this guide to better understand what information is available and how you can personalize PA7.

Access Your Profile

To access your profile, follow the steps below:

1. Log into PeopleAdmin 7 with your ISU Net ID and Password

2. Click **My Profile**

This page will show the **status of your user account**, **supervisor**, and **groups** in which you are assigned.

*View Organizational Information and Scope*

In the summary tab of your profile, you will see your First/Last name, email address, University ID number, and Organizational Unit Ids (set to ISU) and Reporting Org Unit (waiting for info from Lisa).

Understanding Your Profile Information Job Aid

Update Email Prefernces

Each user gains access to PA7 with all email notifications turned on. To update your email preferences, follow the steps below:

1. Click **My Profile** in PA7

2. Click the **Manage Emails** tab

3. Check **Opt Out** for System Events or Position Type Events for which you would not like to receive email notifications

4. Click **Update System Email Options** to complete
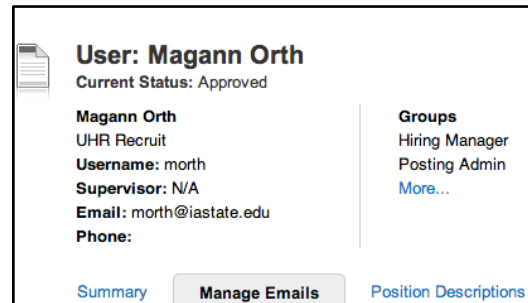
View Position Descriptions

Although you can view your Position Description (PD) when targeting employee, you can also view your PD through following the steps below:

1. Click **My Profile** in PA7

2. Click the **Position Description** tab

   a. If this is not available, you are not seated in a PD.

3. Click the listed PD to view more information
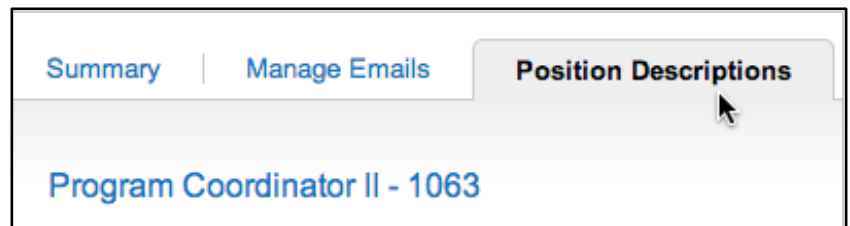
Understanding Your Profile Information Job Aid

Group Assignments
Group Assignments are very important to PA7. Use the table below to guide you through the various roles and responsibilities of each user group.

User Group	Description
Employee	Able to view his/her PD and initiate a modification (reclassification or update) action.
Hiring Manager	Used to assign a person to view/edit a position description, typically the functional supervisor of the incumbent.
Posting Admin	The posting admin will manage the posting and applicants. For Faculty/Other and temporary postings, the posting admin will create the posting for fill. The posting admin will route postings for approval, rate and route applicants, and create a hiring proposal for the final candidate(s).
Dept/Director	Users will approve position descriptions (new, modifications, reclassifications), approve postings, review applicants, approve interview selections and approve hiring proposals.
Dean/AVP	
President/Senior VP	
Provost	
Search Committee Member	The search committee member group is used so those associated with the search, but not leading the search, can view applicant documents such as resume and application. The search committee also has the ability to rate applicants within the system.

Request a New Group Assignment
To request a group assignment (such as access to a different department or if your responsibilities have changed), follow the steps below:
1. Click **Take Action on user** on the Summary Page
2. Select **Request Group Change**
   a. This page presents assigned groups and pending assignments
3. Select the **group** you wish to join (see table above for associated description and responsibilities)
4. Click **Request New Group**
5. Select the **organizational unit(s) or department(s) scope** for this requested user group
6. Click **Request Group Assignment** to complete your request

UHR will process your request. You will receive an email when your account is activated or you will see when you log in your user group toggle has the new group.

Understanding a Position Description Job Aid

Purpose: Each P&S and Merit employee at the University has a Position Description (PD). This job aid will provide insight as to what a Position Description (PD) is, why it is important, and how to access your own PD. This guide will also explain in detail how PDs are evaluated.

What is a Position Description (PD)?

A position description (PD) is a document explaining the duties and responsibilities of a position at the University. PDs promote equity across campus, set expectations of performance, and also serve as a basis for external postings. All full and part-time P&S and Merit (organized and non-organized) employees have a PD, which is used to determine position classification and pay grade.

PDs are created for new positions and modified when there is a change in duties or to start a reclassification. PDs should be written for the position, not for the incumbent and should provide a clear picture of what the duties of the position are to someone who is unfamiliar with the position (e.g. new director or supervisor).

The classification of a PD is determined through examining all sections, including the duties and factors. The duties influence the family/series (e.g. Academic Adviser compared to a Student Services Specialist) and the factors influence the pay grade (e.g. II or III).

Why is a PD Important?

A PD is important because it documents the expected roles, responsibilities, and impact of the position. A PD has three major impacts: Classification & Pay, Performance Expectations, and serves as a resource for other departmental processes.

Classification & Pay

An accurate PD contains elements that determine how a position should be classified, which affects not only the classification, but also the level of the classification. For example, the factors indicate the appropriate pay grade – P33 for example, whereas the duties may identify that the position is an Accountant. The combination of factors (pay grade) and job family or series (duties) in this case, would indicate that the classification is an Accountant II. This enables HR to further identify the most appropriate internal and external benchmarks. The combination of these elements guide salary recommendations for positions. An accurate PD and classification aligns pay more closely with the external market and helps preserve internal equity at the University. The classification may also identify a career ladder or natural progression as the accountant example illustrates.

Performance Expectations

The PD identifies what duties should be performed; the knowledge, skills and abilities needed to perform them well, and identifies essential elements to the position. The supervisor should have a vested interested in this document, as it should be used during yearly performance appraisals to assess if an employee is meeting the expectations set in the job description. This process can

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uhrcc@iastate.edu

Understanding a Position Description Job Aid

also help to identify changes to a position over time and determine if a reclassification is appropriate.

Recruitment Services
The position description is the basis for a posting to attract candidates to a position. It is important that the PD is accurate to manage expectations and potential applicants receive a realistic representation of the position. Inflating or understating the duties of the position can result in a gap between the skill level needed for the job and the candidate selected. In turn, this can cause performance issues, increased turnover or inequities among employees.

Benefits Office
One example of how the benefits office uses the position description is by gathering information to assist in determining eligibility for long-term disability. The classification and position description also help determine eligibility and options for retirement and other benefits programs such as health and dental.

Employee Relations / Labor Relations
Employee Relations and Labor Relations (ERLR) is involved with disability cases in addition to worker's compensation cases. The position description outlines essential functions, which may aid in determining what reasonable accommodations should be made for employees. ERLR is also involved in performance management issues and use the PD to determine what expectations should be for an employee or to help set accurate and reasonable expectations. The classification and PD also determine if a position is covered by a collective bargaining agreement and may guide processes and expectations for positions.

How to Access Your PD
The following steps will lead you to viewing your own Position Description:

1. Navigate to www.iastatejobs.com/hr /login
2. Click the yellow link
3. Enter your **Net ID** and **associated password**
   a. If you forgot your password, click the "I Forgot my Username/Password" link
4. Click **My Profile** at the top of the page and select the **Position Description** tab
5. Select the blue title link with your University title to view your PD

For questions, please email uhrcc@iastate.edu

PA_Understanding_A_Position_Description_JOB
Rev. 11/5/14

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Understanding a Position Description Job Aid

How is a PD Evaluated for Classification?

When writing or modifying a PD, it is important to understand how the PD is evaluated. Each PD is evaluated on a point-based system and each pay grade has an associated point range. Points are given based on the seven compensable factors, which include:

Factor 1	Knowledge and Experience	16.5%

This factor measures the knowledge needed to perform assigned duties or to function at the appropriate scholarly or professional level. Knowledge is generally acquired through a formal education, on-the-job training, and prior work experience.

Factor 2	Complexity	16%

This factor measures the variety and difficulty of the tasks necessary for successful completion of work. Consider the amount of judgment and analytical thinking necessary along with the availability of policies, procedures, precedents and standards for guiding the position's actions.

Factor 3	Innovation	17.1%

This factor measures the extent to which the job demands resourcefulness, creativity, ingenuity, or inventiveness. This factor considers the degree of original thinking required to organize or develop new or improved methods, ideas, strategies, procedures or techniques.

Factor 4	Impact on Institutional Mission	13.9%

This factor assesses the scope of responsibility of the job with regard to the overall institutional mission of the University, and relative to positive or negative outcomes. Consider the following as possible points of Impact on Institutional Mission: research, instruction, instructional support, outreach programs, public relations, administration, support services, revenue generation, financial and/or asset control and student advisement and development.

Factor 5	Internal Interactions	15.6%

This factor appraises the responsibility for working with or through other people employed by the University to get results. Consider the nature and level of contact encountered on a regular, recurring and essential basis during operations. Consider whether the contacts involve furnishing or obtaining information, influencing others or negotiating. Only those internal contacts outside the position's immediate work unit/area should be considered.

Factor 6	External Interactions	12%

This factor appraises the responsibility for working with or through other people outside the University to get results. Consider the nature and level of contact encountered on a regular, recurring and essential basis during operations. Consider whether the contacts involve furnishing or obtaining information, influencing others or negotiating.

Factor 7	Leadership Responsibility	8.9%

This factor measures the job's leadership responsibility. It appraises the extent of responsibility for the organization, selection, assignment, guidance and review of other staff. It also addresses project assignment responsibilities and the guidance or direction given in a professional capacity that ensures the maintenance of satisfactory human relations and/or productive atmosphere.

Writing a Position Description Job Aid

Purpose: The purpose of the job aid is to guide users through the process of completing a Position Description (PD) for update, fill or reclassification. A PD can be created, or modified for Professional and Scientific (P&S) or Merit employees. In each section, there is a description of what is necessary as well as examples or questions that should be answered when writing a PD.

Writing a Position Description Job Aid

What is a Position Description (PD)?

A position description (PD) is a document explaining the duties and responsibilities of a position at the University. PDs promote equity across campus, set expectations of performance, and also serve as a basis for external postings. All full and part-time P&S and Merit (organized and non-organized) employees have a PD, which is used to determine position classification and pay grade.

PDs are created for new positions and modified when there is a change in duties or to request a reclassification. PDs should be written for the position, not for the incumbent and should provide a clear picture of what the duties of the position are to someone who is unfamiliar with the position (e.g. new director or supervisor).

The job factors of a PD determine the pay grade. The duties determine the classification/series (e.g. Student Services Specialist compared to an Academic Adviser).

Duties and Responsibilities

Use the following steps and guidelines to create the duties/responsibilities of this position.

1. Create a list of all the duties assigned to the position (brainstorm); duties can be a combination of related tasks.

    o   Task - typing the minutes of a particular meeting.

    o   Duty - maintaining a record of minutes from a series of meetings.

2. Draft a statement for each duty starting with an action verb. e.g. hire, train, evaluate, discipline and supervise two student office workers.

3. Group duties that belong together and provide a job duty label that describes the function of the group (e.g. 'Advising' is a set of duties).

4. The total percent of must equal 100%.

Writing a Position Description Job Aid

Qualifications : Education, Experience, Licensure & Certifications

Description: This section addresses the education, experience, and qualifications necessary to perform the duties required to function at the position's classification level. There are two types of qualifications: required and preferred.

Required Education and Experience (P&S) or Required Qualifications (Merit)

Required qualifications include what is minimally acceptable in order to perform the duties of the position. Required Education and Experience (P&S), Required Qualifications (Merit), and Required Licensure/Certifications prepopulate in the Classification and Hiring System based on the University title (e.g. Clerk IV).

Supplemental Required Education and Experience

This section is for P&S only. P&S position descriptions may further define required qualifications by adding a specific degree field or type of experience. When a classification requires a Bachelor's degree or higher, a related degree type may be specified. Qualifications for Merit positions are determined by the Board of Regents and cannot be changed.

Preferred Education and Experience (P&S) or Preferred Qualifications (Merit)

Preferred qualifications identify additional measureable qualifications that help assess applicant pools. Preferred qualifications are helpful during the hiring process to rate candidates. Screening questions are also derived from preferred qualifications. Preferred qualifications should not include individual characteristics (or soft skills) such as knowledge, skills, and abilities that cannot be confirmed by applicant provided documents. If the applicant does not have the listed preferred education and experience or preferred qualifications, the applicant may still be considered for the position.

- What specific experience would place one applicant ahead of others?
- What education or experience type would be helpful for the position, if not required?
- What qualification would aid the search committee to rate candidates?

Examples include a more advanced degree, a specific degree field or program of study, or a specific type of experience that is directly related to the duties of the position.

Required Licensure or Certification

This section should include any licensure or certification that is required to perform the duties and may vary by position. The hiring department should also provide the accrediting/certifying group or organization along with the issuing state, if applicable. If the licensure is listed as required, any application without that licensure will be labeled as not qualified.

Examples:

Writing a Position Description Job Aid

- Professional in Human Resources (PHR), Human Resource Certification Institute

- Licensed teacher, State of Iowa.

Preferred Licensure and Certification

Preferred licensure and certification is used to assess candidates that are best licensed or certified for the position. The hiring department should provide the accrediting/certifying group or organization along with the issuing state, if applicable. If the applicant does not have the listed preferred licensure or certification, the applicant may still be considered for the position.

Knowledge, Skills and Abilities (KSA) Required

Description: This bulleted list should include the knowledge, skills and/or abilities needed to fully function in this position. All KSAs listed should be related to the duties and expectations of the position. This section should not include experience and should have one of the three terms (knowledge, skill, ability) in each bulleted statement. Examples include:

- *Knowledge* of health Insurance portability and Accountability Act (HIPAA) and the rules and regulations applied to data security
- Proficient *skill* using the MS Office Suite
- *Ability* to work in extremely cold temperatures

Writing a Position Description Job Aid

Complexity

Description: Complexity measures the variety and difficulty of the duties necessary for successful completion of work and considers the amount of judgment and analytical thinking necessary along with the availability of policies, procedures, precedents, and standards for guiding the position's actions. In this section, the writer should give one to two examples of complex problems or projects included in the position.

Do	Don't
Describe what thinking and guidelines are considered by the position	Assume understanding
Explain the most complex duty for which the position is responsible first	Explain what is individually challenging based on one person's skill set
Explain and specify detail as if the reader is unfamiliar with the position, field of work, or organizational structure e.g. Creating professional annual reports for budgeting requires gathering and analyzing information from multiple industry sources, including primary and secondary sources.	Use overly vague language e.g. Responsible for annual reports
Provide examples	Make statements that can't be supported by position duties and expectations
Write the position as a business document e.g. *This position is responsible for…*	Write in the first person e.g. *I do my work, etc.*
Elaborate and consider what is being requested	Copy from duty section
Describe/show how a position is complex supported by examples	Make value statements e.g. This position is highly complex.
Spell out acronyms	Assume acronyms are globally understood

Writing a Position Description Job Aid

Examples: The following examples are all well written. They demonstrate a good example of a high complexity level, mid complexity level and low complexity level. All examples in subsequent sections are considered good examples for a summary statement, unless otherwise stated. Examples should be provided to support the summary statement.

High	This position is responsible for creating policies for broad use by the University and leading teams of senior-level managers to address critical projects related to the Board of Regents, public advocacy, restructuring and strategic initiatives with University wide impact. Projects are critical to the mission of the University and support initiatives of the President.
Mid	This position creates policies for the college and leads a broad scope of projects related to marketing, private industry, admissions to the college, and graduation rates. Projects are critical to the mission of the college and support initiatives of the Dean.
Low	This position has a high level of ability for problem solving and must have an analytical mindset to complete fiscal and human resources duties. This position follows established processes and procedures within a single program area.

Innovation

Description: Innovation measures the extent to which the job demands resourcefulness, creativity, ingenuity or inventiveness. This factor considers the degree of original thinking required to organize or develop new or improved methods, ideas, strategies, procedures or techniques.

Examples:

High	This position is charged with solving complex scientific problems and has little precedent to draw from. Traditional techniques are rarely useful and this position must create new methods to address challenges. Novel research initiatives are formulated and developed by this position and are of national and international interest.
Mid	This position is responsible for developing new methods for sample preparation and modifying existing instrumentation to meet unique research needs.
Low	This position is responsible for improving existing standard procedures and processes to increase efficiency of the work unit.

Writing a Position Description Job Aid

Impact on Institutional Mission

Description: Impact on Institutional Mission refers to both scope and freedom of action. It measures the scope (breadth) of responsibility of the job with regard to the overall institutional mission, in addition to the freedom of action (depth), and the level of authority and responsibility for a position. Other examples or things to consider may be research, instructional support, programs, public relations, administration, support services, finance or asset control, student advising and development.

The scope may range from an immediate work unit, to department, college, University, national, or global impact and can have a positive or negative effect.

Scope	
Form/Field	*Writing Guidance*
Positive Impact	Describe what units, departments, colleges/divisions this position effects. Describe the overall positive effect of decisions made by this position. A thing to consider may be what is impacted by this position and how is it impacted. This may include multiple stakeholders and responsibilities. *Example*: The position ensures that the research lab spends funds within the parameters and guidelines of the university and other funding sources This positively affects the ability of the department to obtain future funding, have positive results on audits, and allows principal investigators to focus on research activities by supporting administrative functions of the research team.
Negative Impact	What mistakes could potentially be made? What are the consequences and who/what would it affect? How is the error corrected? *Example*: This position could allow an expense on a grant account that violates guidelines for the grant and causes the item to not be reimbursed. This would cause a principal investigator to potentially lose an award and may negatively affect the future ability to obtain funding.
Monetary or Quantitative Impact	Support other factors using quantitative or monetary data. *Example*: Responsible for post-award monitoring for two grants worth a total of $3 million. NSF provides one grant for $2 million on a multi-institutional grant, where ISU acts as the subcontractor. The other grant is provided for the same program through the state for educational programming.

Writing a Position Description Job Aid

The freedom of action articulates the authority to make decisions that have impact beyond the unit, department, college or university.

Freedom of Action	
Form/Field	*Writing Guidance*
Supervisor Guidance	Describe the type of guidance given by the hiring supervisor and how often. Describe the types of decisions the position makes on a regular basis and what types of decisions the supervisor makes the final decision on. It is not enough to say that a position is autonomous. *Example*: The hiring supervisor refers to resources, provides project direction, sets goals, establishes desired outcomes, and meets with the incumbent on a bimonthly basis. This position makes recommendations for the hiring supervisor's approval. Recommendations typically affect operations of the research lab.
Policies and Procedures	Describe what guides the work. Do these policies, procedures, regulations and laws aid in making appropriate decisions, create barriers to completing duties, or provide guidance in areas for interpretation? Describe not only what is used, but how and/or why. *Example*: The position is governed by federal, state, and local laws; the Iowa Administrative Code, the Code of Iowa, Civil and Criminal procedure and all institutional policies and procedures.

Writing a Position Description Job Aid

Internal Interactions

Description: The Internal Interactions section appraises the responsibility for working with or through others within the University community, including students, staff, and faculty on a regular, recurring, and essential basis for operations. This section does **not** include contacts within the position's immediate work area/unit.

Below are questions to address when completing this section:

- With what positions, units, departments, and groups does the position interact?

- What is the purpose of the interaction? (e.g. providing or obtaining information, influencing others or decisions, or negotiating).

- What is the potential impact of the interaction?

- At what rate do the interactions occur (regularly, recurring, essential)?

Examples:

High	Regular and recurring interactions with University Council, the President, deans and department chairs, Senior Vice President and Provost, budget cabinet and other university partners to negotiate, mediate, resolve disputes and provide consultation and guidance to create effective policies for the University.
Mid	This position has daily contact with interdepartmental researchers and academic staff responding to questions and problem reports related to soybean research and experimental design. This position provides informed input on statistical analysis for the research project.
Low	This position communicates with students daily regarding payment plans. Without this communication, students often make late payments and incur charges.

Writing a Position Description Job Aid

External Interactions

Description: The external interactions section measures the responsibility for working with or through others *outside* the University to perform the duties of this position. Consider the nature and level of contact encountered on a regular, recurring, and essential basis.

Below are questions to address when completing this section:

- What people, groups, entities, government agencies, or other external constituents does this position work with?

- What is the purpose of the interaction? For example, providing or obtaining information, influencing others or decisions, or negotiating.

- What is the potential impact of the interaction?

- At what rate do the interactions occur (regularly, recurring, essential)?

Examples:

High	This position will negotiate contracts with external health care providers for university wide benefit programs. Negotiation requires tact to discuss key issues and solve problems related to plans, coverage, and premiums affecting students, faculty and staff.
Mid	This position will collaborate with researchers from other universities on a biweekly basis to design novel experiments regarding plant genetics and disseminate confidential research results. Information will be complex in nature, due to the advanced level of research and will require a high level of interpretation and explanation.
Low	This position will call and email external vendors and sales personnel to discuss equipment and purchase part replacements monthly.

Writing a Position Description Job Aid

Leadership

Description: Leadership provides a description of positions and projects that are directly and indirectly supervised by this position. The table below clarifies the difference between direct and indirect responsibilities.

Direct Supervisor	Indirect Supervisor
A direct supervisor would have the authority to make hiring decisions and would be responsible to evaluate performance, discipline, and terminate direct reports. A direct supervisor would also oversee administrative personnel functions, such as scheduling and leave management for the employee.	An indirect supervisor would monitor progress and review and assign tasks for a student, merit, or P&S employee. An indirect supervisor can assign and evaluate direction of a project.
Additionally, a direct/indirect supervisor would train, assign tasks, observe and review student, merit, and/or P&S employee(s).	

This section may include responsibility for project or process leadership where guiding and leading others is required to achieve a common goal.

Example: This position is responsible for leading groups of IT professionals, both P&S and Merit, on enterprise system projects. Project leadership includes guiding the group, assigning and reviewing tasks, and collaborating with groups across units.
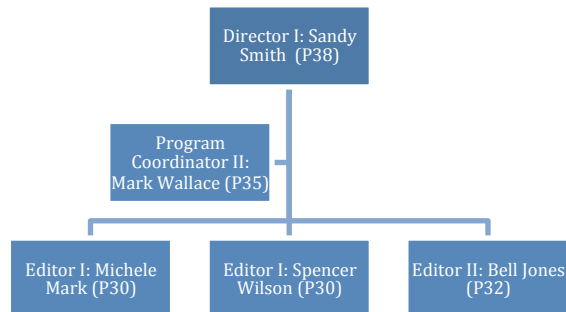
Documents

The organization chart must include or reference (e*xample provided on next page*):

- all employee names, classifications, and pay grades
- solid and dotted lines to represent direct and indirect reporting relationships

Writing a Position Description Job Aid

Organization Chart Example:

Note: For instructions on how to create an org chart, please see Microsoft's resource on **Creating an Organization Chart in Word**

(http://office.microsoft.com/en-us/word-help/create-an-organization-chart-HA010354860.aspx).

```
                    Director I: Sandy
                      Smith  (P38)

                    Program
                    Coordinator II:
                    Mark Wallace (P35)

   Editor I: Michele    Editor I: Spencer    Editor II: Bell Jones
     Mark (P30)          Wilson (P30)              (P32)
```

 If a position is split between two departments, two org charts should be provided.

Other Essential Functions

Description: It is important to define the physical requirements and environmental conditions of the position because they may impact decisions relating to performance appraisals, disability accommodations and worker's compensation. When writing a position description, be sure to adequately describe the frequency in which the applicant may be exposed to physical and environmental conditions as well as any other potential exposure to hazards.

Below are questions to address when completing this section:

- What conditions will the position encounter to complete the job responsibilities?
- What is the frequency of the function identified?
- **Note**: Even if a function is performed infrequently or a small portion of time, it may be crucial enough to the position to be considered an essential function if the consequences of not performing the function would result in harm to the operation of the department or unit (e.g. The position will operate a forklift once a calendar year to relocate equipment shipments).

Below are a few condition examples:

- *Physical Requirements*: standing, walking, lifting, pulling, climbing, reaching, tasting, hand operations, hand/eye coordination
- *Environmental Conditions*: extreme heat/cold, lighting, humidity, exposure to chemicals, noise pollution, air pollution, work hazards, and possibility of disease exposure or electric shock

Sample Physical Requirements Statements:

- Must be able to regularly lift 50-70 lbs. in the computer server room on a nightly basis.
- Position will be sedentary at a desk while using a computer.

Sample Environmental Conditions Statements:

- Position will be exposed to extreme heat and noise pollution.
- Position will be exposed to pesticides, dust, pollen, mold, and fuel and will be around machinery with moving parts.

Writing a Position Description Job Aid

Summary of Essential Duties and Responsibilities

Description: A job summary is a structured overview of the key aspects of a position. The information in this section should provide the applicant with a clear understanding of the position's essential duties, responsibilities as well as soft skills and abilities of the ideal candidate.

The summary section should be formatted in the following structure:

Topic	Description

Introduction	Opening sentence containing:
	
	• Iowa State University
	• Department name
	• Optional:
	    o College/Unit
	    o Responsibilities/overview of the Department
	    o Work location if other than campus building

Job Duties/ Responsibilities Overview	Do Include: • Describe primary or fundamental duties and responsibilities • Duties and responsibilities that expand on why certain qualifications are required or preferred Avoid: • The phrase 'other duties as assigned' • Acronyms without stating the full name at least once
The 'successful candidate' description	Sentences including: • Distinguishing characteristics about the position • Knowledge, abilities or skills • Work hours if includes nights, weekends, travel • Other important information for the applicant to understand

P&S Job Summary Example

The Department of Agronomy at Iowa State University is seeking candidates for an Assistant Scientist II. The Agronomy Department in the College of Agriculture and Life Sciences provides research-based educational programs in a variety of agronomic areas to support producers and agri-business professionals. Our objective is to make crop production more efficient, more productive, and economically and environmentally sustainable.

Writing a Position Description Job Aid

This position will implement and manage all field and laboratory research studies conducted by the cropping systems research and extension program. The program designs and conducts research experiments in collaboration with crop physiologist, soil scientists, entomologists, geneticists, and appropriate scientists in other disciplines.

Responsibilities include managing facilities, equipment, research fields on university and private farms, designing field and laboratory experiments, identifying research sites, plot establishment, pesticide application, collecting data and samples throughout the growing season, harvest, and writing reports. Other duties include supervision of undergraduate and graduate students, and teaching them the research methods and practices used for obtaining meaningful research data. This position frequently faces unique situations requiring rapid decision making based on sound agronomic principles with little or no input from other persons.

The successful candidate will possess strong problem-solving capabilities along with the ability to work independently as well as with a team. The candidate will also be detail oriented with solid interpersonal skills to effectively interact with personnel, which include technicians, students and hourly employees.

Merit Job Summary Example

Iowa State University is seeking applicants for a Food Service Coordinator II. This position works under the Manager and Assistant Manager of Campus Cafés. Responsibilities include: forecasting product needs; setting up for service, preparing, and serving food and beverages to customers at the ABE's Harvest Cafe; coordinating opening and closing activities of the café; coordinating production requirements with the commissary kitchen, bakery, and supplies from Food Stores and other vendors; maintaining food and beverage record keeping; ensuring safe and sanitary handling of all food and drink products, equipment and supplies; assuming responsibility for training and supervision of student employees; and other duties as assigned by management. This position will serve as the on-site supervisor at the ABE's Harvest Cafe during normal hours of operation and oversee student employees with respect to training, supervising their work performance, and any relevant communications back to the Campus Cafes' management team.

The duties of this position require the ability to lift/push/pull cases of food and bags of produce weighing up to 50 pounds, the ability to work cooperatively as a team member in a team-oriented environment and to train and work cooperatively with student staff. The ability to serve students, faculty, staff and university guests in a hospitable, customer-oriented manner is essential. Ability to perform basic math skills and calculate the number of portions prepared and served for record-keeping and estimating quantities of ingredients is needed for recipe preparation.

Quick Reference Guide: Creating a Merit Position Description

Instructions: Use the following steps to **Create a Merit Position Description** in People Admin 7. A position description (PD) is a document explaining the duties and responsibilities of a position at the University. All full and part-time P&S and Merit employees have a PD, which is used to determine position classification and pay grade.
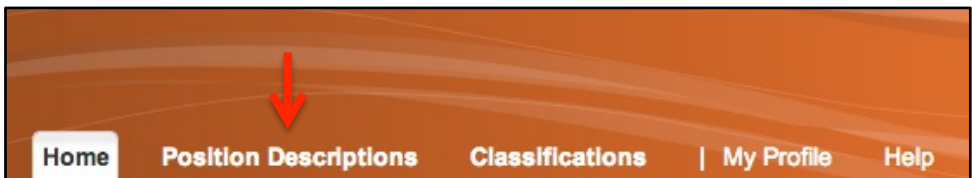
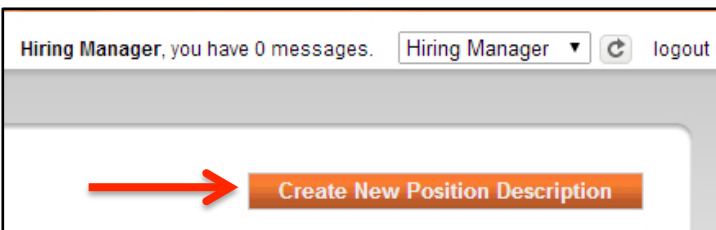Applicant Tracking

Position Management

✓ Hiring Manager
✓ Dept. Chair/Director
✓ Dean/AVP
✓ President/Senior VP
✓ Provost

For more information, see the **Understanding a Position Description Job Aid** or **Creating a Merit Position Description Job Aid**.

1. Hover over **Position Descriptions** and select **Merit**.

   Home   Position Descriptions   Classifications | My Profile   Help

2. Click **Create New Position Description**.

   Hiring Manager, you have 0 messages.   Hiring Manager ▾ ↻ logout

   Create New Position Description

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

   Create New   ✖
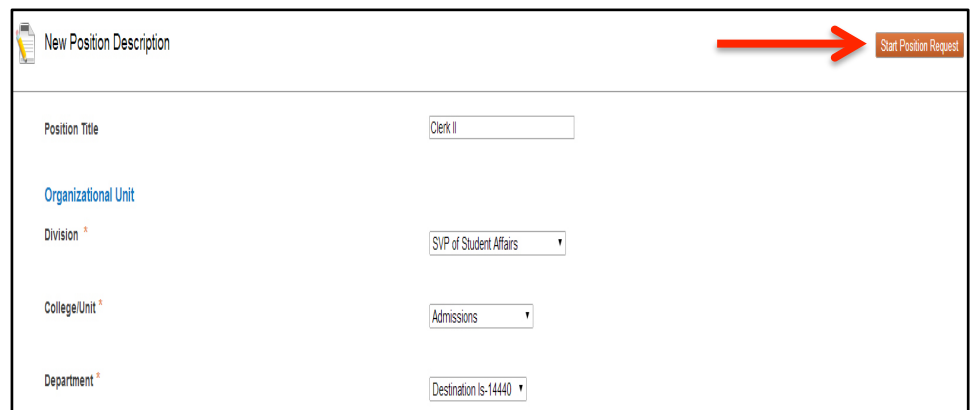
   Choose the position request you would like to start.

   New Position Description
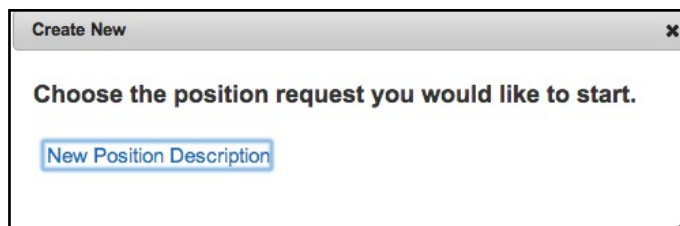
Quick Reference Guide: Creating a Merit Position Description

4. Type in the official university title (Classification) in the **Position Title** field.

5. **Modify** the division, college/unit, or department if needed.

6. Click **Start Position Request** in the top right corner when finished or proceed to copy from existing, using the note below.

Note: You can create a Position Description from an existing Position Description by selecting a radio button next to the Position Description.

7. Fill in the required fields. For more detailed information, see **Writing a Position Description Job Aid** or **Creating a Merit Position Description Job Aid**.

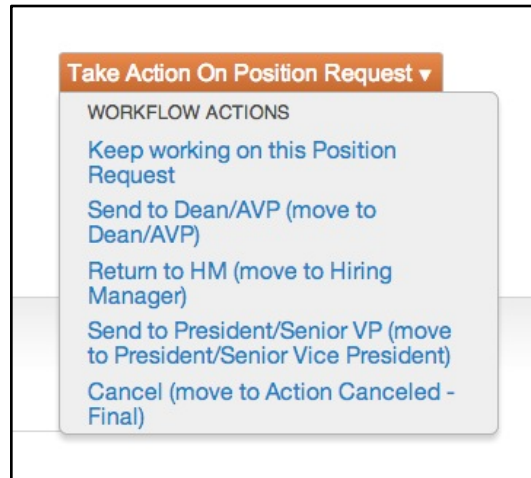*Note:* The section you are currently viewing will not have a checkmark.

Quick Reference Guide: Creating a Merit Position Description

8. Hover over **Take Action On Position Request** and select the appropriate workflow for your organizational structure.

   Alternatively, you can save the **Position Description** for later (*Keep working on Position Request*) or return to the **Hiring Manager** for revision.

Take Action On Position Request ▾

WORKFLOW ACTIONS

Keep working on this Position Request

Send to Dean/AVP (move to Dean/AVP)

Return to HM (move to Hiring Manager)

Send to President/Senior VP (move to President/Senior Vice President)

Cancel (move to Action Canceled - Final)

You should see a green bar appear at the top of the page. A **green bar** means the **Hiring Proposal** has successfully been routed for review. The status will also change from draft to the appropriate workflow step. If you see a **red bar** the action you were trying to take was unsuccessful, go back and review the noted sections.

Creating a Merit Position Description Job Aid

Purpose: When creating a Merit Position Description (PD) in People Admin 7, use this as a guide to complete the required and optional forms and fields. Reference the **Creating a Merit Position Description Quick Reference Guide or Writing a Position Description Job Aid** for information on the process of creating a Merit PD.

New Position Description

This section provides basic details regarding the new position you are requesting. Use the tables below as guidance for each field.

New Position Description	
Position Title	The position title should be the University Title for the desired Classification (e.g. Secretary II or Clerk IV).
*Division *College/Unit *Department	These fields will be pre-populated based on PeopleAdmin account access. If there is a need to create a PD in a department unavailable based on user access, please contact UHR Class/Comp.

Creating a Merit Position Description Job Aid

Action Justification Section

This section will provide written guidance for each form/field in the Action Justification section of a PD.

Position Justification	
*Are you going to fill this position?	If posting this position, select yes.
*Justification for Action	Explain why this position is being added or the current need for this position.
Multiple Position Advertisement	
*Are you filling multiple positions from one posting?	If hiring more than one position from this posting, please select Yes.
Additional Position Numbers for Multiple Position Advertisement	Enter PD numbers of all positions to be filled on this vacancy, if available.
Position Recommendations	
*University Title Recommendation to UHR	Type the classification for which this PD is created. Please note, UHR has the final determination of each PD/Classification at Iowa State University.

Classification Selection

This section provides basic details regarding the classification (e.g. Custodian or Clerk IV) requested, such as University Title, Pay Grade, and Required Qualifications. Use the filter to limit results.

Creating a Merit Position Description Job Aid

Position Details

This section provides basic details regarding the new position requested. Use the table below as guidance for each field. If cloning an existing position description, complete that first.

Classification Selection	
This area is pre-populated based on classification selection.	
Position Details	
*Position Title	The position title should be the formal university title (e.g. Clerk IV).
Position Number	This field will be generated by the system once it is routed for approval. Formats include: P&S : PS###### Merit : M####### Faculty : #######
Appointment Type	Make the appropriate selection. This is an editable field that will be carried over to the posting and hiring proposal.
Base of Employment	Make the appropriate selection. This is an editable field that will be carried over to the posting and hiring proposal.
*Confidential Position	A confidential position is exempt from the collective bargaining agreement as defined in Chapter 20 of the Iowa Code.
*Pay Frequency	Monthly or Semi-Monthly
*Number of Months Employed per Year	1-12 months or select semester
Location (if other than Ames)	Fill this out if the position will work in a location outside of Ames a majority of the time.
Work Unit	See Index: Work Unit below for guidance.
*Summary of Duties and Responsibilities	Reference *Writing a Position Description Job Aid* for detailed writing guidance.
Hiring Manager	The hiring manager (HM) can be a supervisor(s) or manager(s) of this PD. The HM will gain view/edit access to this PD.
Previous Incumbent	Previous employee seated in the position description
Job Duties	
Job Duty Label is used to label major functions of the job. A minimum of three builder entries are required, including one that must read 'Other duties as assigned – 5%.'	
*Job Duty Label	Reference Writing a Position Description Job Aid for detailed writing guidance.
*Description of Job Duty	
*Percent of Time	Typically, job duties should be no more than 45%. The percent of total time must add up to 100%.

Creating a Merit Position Description Job Aid

Supervision	
This section is to be completed for positions that supervise AFSCME staff members. To be eligible, the supervisor must have the authority to hire; discipline; sign the performance evaluation; terminate; train; assign work; and check work of those they supervise. Please indicate all university titles this position supervises and the number of individuals in each title.	
University Title of Positions Supervised	
Total Head Count Per University Title	For example, enter 2 if this PD is supervising 2 Clerk I's. Add a new entry for each University Title supervised.
Total FTE Supervised Per University Title Selected	For example, although there are 2 positions supervised, the FTE might equal 1.2 FTE.
Hire	Answer Yes or No to the question in the drop-down menu.
Discipline	
Sign Evaluation	
Terminate	If no supervisory activities are assigned or allocated to this PD, remove entry.
Train	
Assign Work	
Check Work	
Equipment/Software	
Category of Equipment/Software	Select a category from the available drop-down menu.
Percent of Time During Average Day	For example: 90%
Is use of this equipment/software essential or non-essential?	Non-Essential should be indicated if the equipment could be removed and the position still able to complete responsibilities.
If essential, please list task specific equipment and reason for use.	For example: Each day the incumbent will need to use the listed equipment to coordinate with external vendors.

Creating a Merit Position Description Job Aid

Complexity

Please indicate total percent of time spent supervising	Enter the amount of time overseeing incumbent's work.
Describe the nature of your responsibility for money, machines, equipment, and supplies.	Examples may include petty cash drawer or payments, machines such as: *Responsible for petty cash of over $43,000 which includes the main safe balance, the safe balances at the 22 venues and the vending machine balances.*
What loss can occur through an honest error? Losses include both dollar outlays and non-monetary or human considerations.	Describe the scope and scale this position is allowed to make an honest error such as: *Lost revenue may occur if sales aren't properly charged. Theft may occur if cash isn't properly secured. Equipment costs may be incurred if repair or replacement is required.*
Records and reports: What records or reports do you prepare which require you to gather, analyze, and summarize data?	List reports and records this position will be responsible to maintain and/or create.
What is the source of the data for the records or reports?	The purpose of the records and reports.
Does the position require work knowledge beyond the duties of this job? If so, state examples below.	See **Writing a Position Description Job Aid** for more information
Work in own department	Describe work done within the hiring department.
Work in other departments	Describe work done outside the hiring department that may fall within the employee's job duties.
University policies	Policies that may affect the employee.

Personal Interaction

Describe the interaction this position will have with different groups of people. These may include faculty, staff, deans, students, etc.

Essential Physical Function

This section is used to determine the physicality of a position. This section will be used to ensure candidates are qualified and serve as a reference for an employee's ongoing need to perform the job. Be sure to take time and select the most appropriate response for the position. A tool is available to provide to supervisors if the Essential Physical Functions are unknown on the project website.

Creating a Merit Position Description Job Aid

Qualifications, Required/Preferred Licensure(s)/Certification(s)

Reference Writing a Position Description Job Aid for detailed writing guidance.

Verification

Although no fields in this section are required, it should be completed during the routing and approval process. By typing in your name, you are certifying the requested action.

Posting Position Details	
Complete the details regarding the position, such as whether this position is full or part time.	
*Advertised Employing Department	Use department name (e.g. English) as opposed to department number.
*Full or Part time	Full/Part-Time.
*Fraction	Used toward FTE total.
*Shift	1st, 2nd, 3rd, Rotating
*Work Schedule	Please indicate the work schedule and include days off. If rotating schedule, please indicate frequency of rotating schedule.
*Number of Hours per Week	10-40 hours
Additional information	Please note any important characteristics regarding any of the fields in the Posting Position Detail section.
Posting Admin	The Posting Admin will review and manage the posting to be created from this PD. The Posting Admin will also rate and route applicants for interviews and start the hiring proposal.
Budget	
*Account	The account number is to provide decision makers information about where funding for this new position salary is to be encumbered. Seven-digits, no dashes.
Sub-Account	Six-digits, no dashes.
*Account # % (1-100)	1-100%. Please note, the system does not calculate so be mindful when calculating percentages.
Recruitment Planning – Posting Details	
*Is this posting for external, internal (to ISU), or waiver of advertisement?	Choose the advertisement method from the drop-down menu.

Creating a Merit Position Description Job Aid

Business Rationale for internal posting or waiving advertisement	If the method is internal or is waived from external advertisement then provide rationale.
For waiver, name of intended hire(s)	If waived enter the planned candidate's name.
List the recruiting resources the department intends to further advertise the posting. The position will automatically be posted on iastatejobs.com and the Iowa Workforce website. Additional advertising is the responsibility of the hiring department.	✓ ISU Employment Opportunities Website ✓ ISU Employee ✓ Website (other than ISU Employment Opportunities) ✓ Placement Office ✓ Trade Journal ✓ Newspaper ✓ Other
Indicate which specific website, placement office, trade journal, newspaper or other resource that you intend to use.	This field will pre-populate in the posting, but is later editable.
*Department Contact Name	This department contact will be used by UHR when approving the PD and also be posted as a contact for applicants.
Department/Unit Website	Departments/Units can provide links to their specific URL to provide applicants a better idea of their potential work unit.
*Do you want this posted longer than the required advertisement period on iastatejobs.com?	The required advertisement period is noted in the Open Search Policy.
If yes, how many calendar days would you like the posting to appear on the web?	Enter calendar days (e.g. 15) you would like to appear on the web. Alternatively, enter the date you would like the posting to be taken down.
Background Check	
What type of background check would you like to conduct?	http://www.hrs.iastate.edu/hrs/node/327
Rationale for a credit check	Enter rationale for a credit check, as most candidates do not receive this type of background check.
*Account for background check charge	Account will be charged when the background check is run. Seven-digits, no dashes.
Sub-Account for background check charge	Six-digits, no dashes.

Creating a Merit Position Description Job Aid

Supplemental Questions

IMPORTANT NOTE: There is a system issue currently for Supplemental Questions. Please do not use this section. Until this issue is fixed, **please upload a Word Document of desired supplemental questions** to the Position Documents section.

Adding New Supplemental Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing question or create a new one.

Adding Existing Supplemental Questions: There are two ways to search for approved supplemental questions to add to the job being posted. You can filter using the key word search or filter by question category.

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the supplemental question.

Supplemental Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Applicant Documents

Indicate applicant documents that will be required, optional, or not used on the posting. Optional and Not Used documents can be reviewed and updated at the time of posting approval. Be sure to update Application Instructions (on the posting) if selecting "other documents."

Supervisor

Use this section to assign a PD/Supervisor to this position. Use the option to filter the results to find a specific position type, department, or PD number.

Position Documents

Upload an organizational chart here. Position Documents are not advertised with the posting. These documents are only accessible to those who can view this PD, including the incumbent. Examples include: relevant emails or communications regarding this position and/or reclassification. Reference, Writing a Position Description Job Aid, for detailed organization chart guidance.

Creating a Merit Position Description Job Aid

INDEX: Work Unit

A work unit is best described as an area where an employee, or unit or team of employees, has been assigned to accomplish specific position responsibilities. Area can refer to:
- a physical location such as an office space, building or group of buildings and/or
- a rotating post or relief post as well as simply a supervisor or group of supervisors.

Careful consideration must be given when defining a work unit due to the impact on a department's ability to manage it's work and employees. Work units identified by the department will be reviewed when analyzing whether a workforce reorganization plan or a new posting is needed.

Departments are not required to create a specific work unit. Where one does not exist, the department is the work unit.

Below are some examples of existing work units:

Department	Classification	Work Unit
FP&M	Custodian I	Team 10
VDL	Laboratory Technician III	Serology
Campus Dining Services	Cook I	Seasons Dining Center

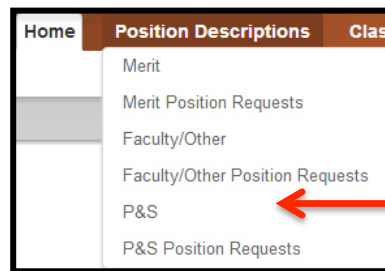# Quick Reference Guide: Creating a P&S Position Description

Instructions: Use the following steps to create a new P&S Position in People Admin. A position description (PD) is a document explaining the duties and responsibilities of a position at the University. All full and part-time P&S and Merit employees have a PD, which is used to determine position classification and pay grade.

Applicant Tracking

Position Management

✓ Hiring Manager
✓ Dept Chair/Director
✓ Dean/AVP
✓ President/Senior VP


1. Hover over **Position Descriptions** and click **P&S.**

Home	Position Descriptions	Clas
	Merit	
	Merit Position Requests	
	Faculty/Other	
	Faculty/Other Position Requests	
	P&S	
	P&S Position Requests	

---

2. Click **Create New Position Description** on the top right.

3. Select **New Position Description** in the box that appears.

   Create New

   Choose the position request you would like to start.

   New Position Description

---
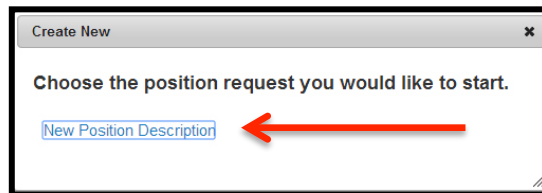
4. Fill out the required information, or **Clone an Existing Position Description** by checking the radio button next to a desired **Position Title.**

Working Title	Position Number
○ Lisa Frank Expert I (RLA)	008000
○ Speech Writer - CA	008000
○ Training Manager - KK	008001
○ Pony Stickers Rock WG	008002

---

5. Click **Start Position Request** when ready to move on.

   Start Position Request   Cancel
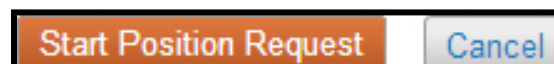
Quick Reference Guide: Creating a P&S Position Description

6. Fill in the required information and click **Next** to move on to the next section. For more detailed information, see **Writing a Position Description Job Aid.**

   Note: Completed fields will be denoted by a **blue checkmark** next to the section title (located on the left). The section you are currently viewing will not have a checkmark.

Editing Position Request

Action Justification
✓ Classification Selection
✓ Position Details
✓ Job Factors
✓ Essential Physical Fun...
✓ Qualifications
✓ Verification
✓ Posting Position Details
✓ Supplemental Questions
✓ Applicant Documents
✓ Supervisor
✓ Position Documents
Position Request Summary

7. Hover over **Take Action On Position Request** and select the appropriate **Workflow** for your organizational structure.

Take Action On Position Request ▾

WORKFLOW ACTIONS

Keep working on this Position Request

Send to Dept Chair (move to Dept Chair/Director)

Send to Dean/AVP (move to Dean/AVP)

Cancel (move to Action Canceled - Final)

You should see a green bar appear at the top of the page. A green bar means the **Position Request** has successfully been routed for review. The Current status will also change from **draft** to the appropriate workflow step. If you see a **red bar** the action you were trying to take was unsuccessful, go back and review the noted sections.

Creating a P&S Position Description Job Aid

Purpose: When creating a P&S Position Description (PD) in People Admin 7, use this as a guide to completing the required and optional forms and fields. Reference the ***Creating a P&S Position Description Quick Reference Guide*** or ***Writing a Position Description Job Aid*** for information on the process of creating a P&S PD.

New Position Description

This section provides basic details regarding the new position you are requesting. Use the tables below as guidance for each field. An * denotes a required field.

New Position Description	
Working Title	The position title should be the University Title for the desired Classification (e.g. Program Coordinator II).
Division	These fields will be pre-populated based on PeopleAdmin account access. If there is a need to create a PD in a department unavailable based on user access, contact UHR Class/Comp.
College/Unit	
Department	

Creating a P&S Position Description Job Aid

Action Justification Section

This section will provide written guidance for each form/field in the Action Justification section of a PD.

Position Justification	
*Are you going to fill this position?	If posting this position, select yes.
*Justification for Action	Explain why this position is being added or the current need for this position.
Multiple Position Advertisement	
*Are you advertising as a series?	If so, Recruitment will format the advertised title of the series with the lowest classification first. PDs should be submitted for each level of the series.
*Are you filling multiple positions from one posting?	If hiring more than one position from this posting, please select Yes.
Additional Position Numbers for Multiple Position Advertisement	Enter PD numbers for all positions to be filled on this vacancy if available (or for a series).
Position Recommendations	
* University Title Recommendation to UHR	Type the classification for which this PD is created. Please note, UHR has the final determination of each PD/Classification at Iowa State University.
Exempt from P&S policies (at-will)	Will this position be an at-will employee? Yes or No

Classification Selection

This section provides basic details regarding the new classification (e.g. Program Coordinator II or Academic Adviser I) requested, such as university title, pay grade, and required qualifications. Use the filter to limit results.

Creating a P&S Position Description Job Aid

Position Details

This section provides basic details regarding the new position requested. Use the table below as guidance for each field. If cloning an existing position description, complete that first.

Classification Selection	
This area is pre-populated based on classification selection.	
Position Details	
Position Number	This field will be generated by the system once it is routed for approval. Formats include: P&S : PS####### Merit : M####### Faculty : #######
Appointment Type	Make the appropriate selection. This is an editable field that will be carried over to the posting and hiring proposal.
FLSA Exempt	Yes or No
*Number of Months Employed per Year	1-12 months or select semester
Location (if other than Ames)	Fill this out if the position will work in a location outside of Ames a majority of the time.
*Summary of Duties and Responsibilities	Reference, **Writing a Position Description Job Aid** for detailed writing guidance.
Hiring Manager	The hiring manager can be a supervisor(s) or manager(s) of this PD. The HM will gain view/edit access to this PD.
Previous Incumbent	Previous employee seated in the position description
Job Duties	
Job Duty Label is used to label major functions of the job. A minimum of three- builder entries are required, including one that must read, Other duties as assigned – 5%.'	
*Job Duty Label *Description of Job Duty	Reference Writing a Position Description Job Aid for detailed writing guidance.
*Percent of Time	Typically, job duties should be no more than45%. The percent of total time must add up to 100%.

Creating a P&S Position Description Job Aid

Job Factors

This section provides basic details regarding the new position you are requesting. Use the table below as guidance for each field. If you plan to clone an existing position description, please complete that first.

Complexity
Complexity measures the variety and difficulty of the duties necessary for successful completion of work. It considers the amount of judgment and analytical thinking necessary, along with the availability of policies, procedures, precedents, and standards for guiding the position's actions. Give one to two examples of complex problems or projects included in the position.

Innovation
Innovation measures the extent to which the job demands resourcefulness, creativity, ingenuity or inventiveness. This factor considers the degree of original thinking required to organize or develop new or improved methods, ideas, strategies, procedures or techniques.

Impact on Institutional Mission	
*Scope – Positive Impact	See screen for instructional text and guidance.
*Scope – Negative Impact	
*Scope – Monetary/Quantitative Impact	
*Freedom of Action – Supervisor Guidance	
*Freedom of Action – Policies and Procedures	

Internal Interactions
Appraises the responsibility for working with or through others within the university community, including students, staff, and faculty on a regular, recurring, and essential basis for operations. This section does not include contacts within the position's immediate work area/unit.

External Interactions
Measures the responsibility for working with or through others outside the university to perform the duties of this position. Consider the nature and level of contact encountered on a regular, recurring, and essential basis.

Leadership	
*Direct Supervision	This should NOT include student employees.
*Indirect Supervision	For example, enter 2 if this PD is supervising two Clerk I's. Add a new entry for each University Title supervised.
*Other Types of Leadership	For example Project coordination, Team Lead, etc.

Creating a P&S Position Description Job Aid

Essential Physical Function

This section is used to determine the physicality of a position. This section has large implications for the safety of the incumbent of this PD. Be sure to take time and select the most appropriate response for the position. There will be a tool available to hand to supervisors if the Essential Physical Functions are unknown.

Qualifications, Required/Preferred Licensure(s)/Certification(s)

Reference **Writing a Position Description Job Aid** for detailed writing guidance.

Verification

Although no fields in this section are required, it should be completed during the routing and approval process. By typing in your name, you are certifying the requested action.

Posting Position Details	
Complete the details regarding the position, such as whether this position is full or part time.	
*Advertised Employing Department	Please use department name (e.g. English) as opposed to department number.
*Full or Part time	Full/PartTime.
*Fraction	Used toward FTE total.
*Shift	1st, 2nd, 3rd, Rotating
Additional information	Please note any important characteristics regarding any of the fields in the Posting Position Detail section.
Number of Positions	Provide the amount of positions that will be filled through his posting.
Proposed Start Date	Enter the proposed start date or text such as "as soon as possible".
Proposed End Date or Length of Term	Only enter if the posting will be term or if there is a known end date for position.
Posting Admin	The Posting Admin will review and manage the posting to be created from this PD. The Posting Admin will also rate and route applicants for interviews and start the hiring proposal.

Budget	
*Account	The account number is to provide decision makers information about where funding for this new position salary is to be encumbered. Seven-digits, no dashes.
Sub-Account	Six-digits, no dashes.

Creating a P&S Position Description Job Aid

*Account # % 1-100	1-100%. Please note the system does not calculate, so be mindful when calculating percentages.

Recruitment Planning – Posting Details	
*Is this posting for external, internal (to ISU), or waiver of advertisement?	Choose the advertisement method.
Business Rationale for internal posting or waiving advertisement	If the method is internal or is waived from external advertisement then provide rationale.
For waiver, name of intended hire(s)	If waived enter the planed candidate's name.
List the recruiting resources the department intends to further advertise the posting. The position will automatically be posted on iastatejobs.com and the Iowa Workforce website. Additional advertising is the responsibility of the hiring department.	✓ ISU Employment Opportunities Website ✓ ISU Employee ✓ Website (other than ISU Employment Opportunities) ✓ Placement Office ✓ Trade Journal ✓ Newspaper ✓ Other
Indicate which specific website, placement office, trade journal, newspaper or other resource that you intend to use.	This field will pre-populate in the posting, but is later editable.
*Department Contact Name	This department contact will be used by UHR when approving the PD and also be posted as a contact for applicants.
Department/Unit Website	Departments/Units can provide links to their specific URL to provide applicants a better idea of their potential work unit.
*Do you want this posted longer than the required advertisement period on iastatejobs.com?	The required advertisement period is noted in the Open Search Policy. (Link?)
If yes, how many calendar days would you like the posting to appear on the web?	Enter calendar days (e.g. 15) you would like to appear on the web. Alternatively, enter the date you would like the posting to be taken down.

Background Check	
What type of background check would you like to conduct?	http://www.hrs.iastate.edu/hrs/node/327
Rationale for a credit check	Enter rationale for a credit check, as most candidates do not receive this type of background check.
*Account for background check charge	Account will be charged when the background check is run. Seven-digits, no dashes.

Creating a P&S Position Description Job Aid

Sub-Account for background check charge	Six-digits, no dashes.

Suplemental Questions

IMPORTANT NOTE: There is a system issue currently for Supplemental Questions. Please do not use this section. Until this issue is fixed, **please upload a Word Document of desired supplemental questions** to the Position Documents section.

The supplemental questions section can be used later to inform the rating process of applicants. There are a few options for supplemental questions:

Adding New Supplemental Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing question or create a new one.

Adding New Supplemental Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category.

The Posting Admin or Search Committee can set up parameters or points for the supplemental answers. The text below explains the automatic rating options:

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

Posting Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Questions must be approved by UHR.

Applicant Documents

Indicate applicant documents that will be required, optional, or not used on the posting. Optional and Not Used documents can be reviewed and updated at the time of posting approval. Be sure to update Application Instructions (on the posting) if selecting "other documents".

Supervisor

Use this section to assign a PD/Supervisor to this position. Use the option to filter the results to find a specific position type, department, or PD number.

Creating a P&S Position Description Job Aid

Position Documents

Upload an organizational chart here. Position Documents are not advertised with the posting. These documents are only accessible to those who can view this PD, including the incumbent. Examples include: relevant emails or communications regarding this position and/or reclassification. Reference, *Writing a Position Description Job Aid*, for detailed organization chart guidance.

## Quick Reference Guide: Modifying an Existing Position Description

Instructions: Use the steps below to modify an existing position description. Update examples include position duties, location, equipment/software, or a new (re)classification. All updates made will be routed for approval through UHR. Please contact Class/Comp for further guidance.

Applicant Tracking

Position Management

✓ Hiring Manager
✓ Dept Chair/Director
✓ Dean/AVP
✓ President/Senior VP

---

1. Hover over **Position Descriptions** and click the appropriate position type.

Position Descriptions	Classifications
Merit	
Merit Position Requests	
Faculty/Other	
Faculty/Other Position Requests	

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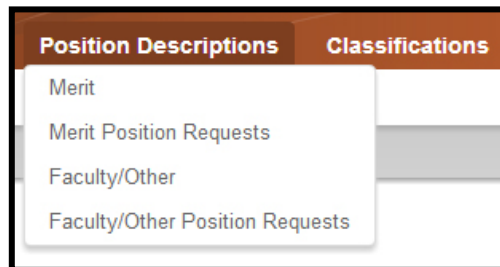
2. Search the **Position Title** or locate the **position description** you would like to update.

3. Hover over **Actions** on the right hand side and click **View.**

Actions

Status	(Actions)
Active	Actions▾
Active	View
Active	Actions▾

---
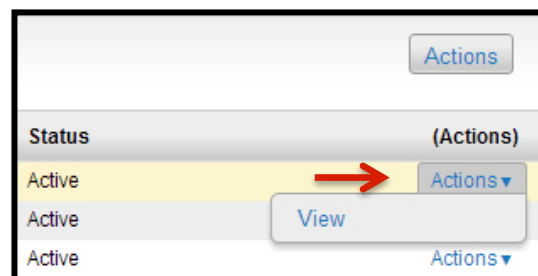
4. Click **Modify Position Description** on the right

5. Begin modifying the position description by clicking **Start.**

🖶 Print Preview (Employee View)

🖶 Print Preview

⭐ Modify Position Description
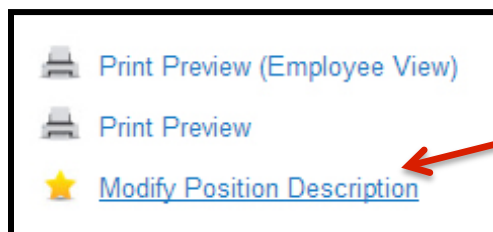
Quick Reference Guide: Modifying an Existing Position Description

6. Select your **Purpose of Action** and fill out all the required fields in the PD.

Reclassification: If you would like to request a change to the classification of the position, choose this option.

Update Position Description: Choose this option if you are NOT changing the classification of the position, only updating its contents.

7. Continue throughout the PD by clicking **Next** and filling out all the required fields.

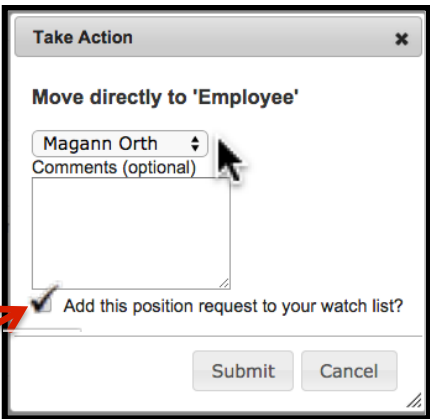8. Click **Position Request Summary** when you are finished.

Note: Completed sections will be denoted by a **blue checkmark** next to the section title (located on the left). The section that you are currently viewing will not have a checkmark.

9. Hover over **Take Action on Position Request** and select the appropriate workflow for your organizational structure.

See screenshot below to route to employee

Quick Reference Guide: Modifying an Existing Position Description

To route to an employee, select that option and select their name in the drop down list:

Note: Create a shortcut to this transaction in your WatchList by checking the bottom option.

You should see a green bar appear at the top of the page. A green bar means the **Position Description** has successfully been routed for review. The Current status will also change from **draft** to the appropriate workflow step. If you see a **red bar**, you will need to go back and review the noted sections.

## Quick Reference Guide: Approving a Position Description

Instructions: Use the following steps to **Approve a Position Request** in People Admin. After you approve a Position Request, you will move the **Position Description** to the next **workflow state**.
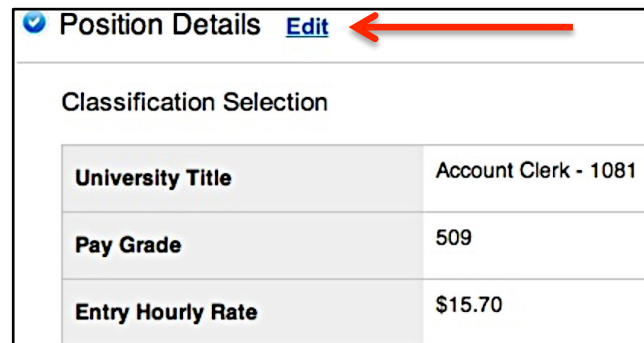
Applicant Tracking
Position Management

- ✓ Dept. Chair/Director
- ✓ Dean/AVP
- ✓ President/Senior VP

1. Click the **Position Requests** tab in the **Inbox**.

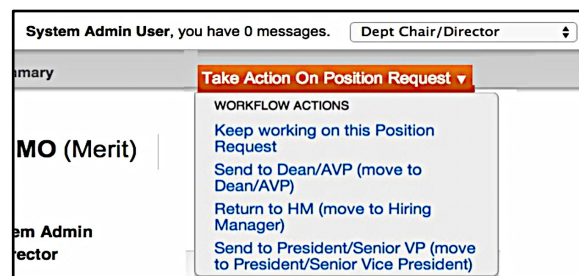2. Click the **Position Request** you wish to view.
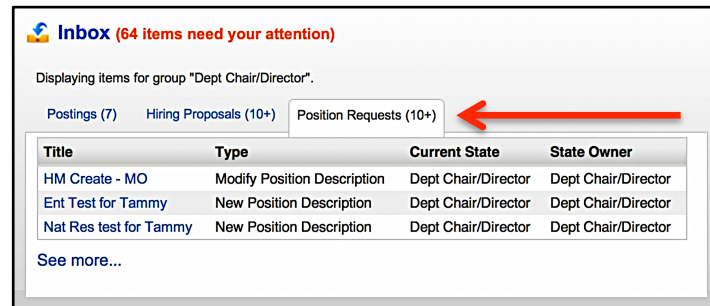
3. Review the P**osition Description** summary.

   Note: Click edit to make any necessary changes.

4. Hover over **Take Action On Position Request** and select the appropriate workflow for your organizational structure.

"**Send to**" means you have approved the Position Request. "**Return to**" means the position request is not approved and needs revising. Be sure to note in the comments box an explanation for your action.

You should see a green bar appear at the top of the page. A green bar means the **Position Description** has successfully been routed for review. The Current status will also change from **draft** to the appropriate workflow step. If you see a **red bar** the action you were trying to take was unsuccessful, go back and review the noted sections.

## Quick Reference Guide: Updating a Supervisor on a Position Description

Instructions: Use the following steps to update a supervisor to a **Position Description**. A supervisor will be tied to a specific **Position Description** (PD) within People Admin, not a person. If a supervisor has moved from their existing PD (*hired into another position, reclassified and has different responsibilities, or has separated from the University*) the process below will need to occur.

Applicant Tracking
Position Management

- ✓ Hiring Manager
- ✓ Dept. Chair/Director
- ✓ Dean/AVP
- ✓ President/Senior VP

1. Hover over the **Position Description tab** and click the appropriate position type.

   Position Descriptions
   Merit
   Merit Position Requests
   Faculty/Other
   Faculty/Other Position Requests
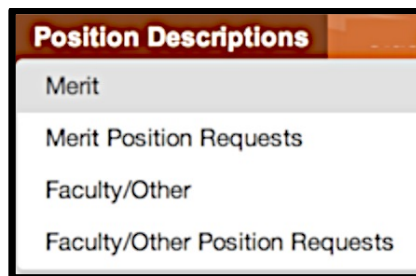
2. Select a **Position Description** to add a supervisor by clicking the title.

	Position Title	Position Number
	Princess	2012001PD
	Merit Pd	M008000
	Admin Assistant	M008001
	Merit PA Test - 04/10	M008002
	PD 4.11	M008003
	Library Assistant I - Jen's Position	M008004
	magann test	M008001
	Super Star WG	M008005

3. Click **Modify Position Description**.

   Take Action On Position Description ▾
   🖨 Print Preview (Employee View)
   🖨 Print Preview
   ⭐ Modify Position Description
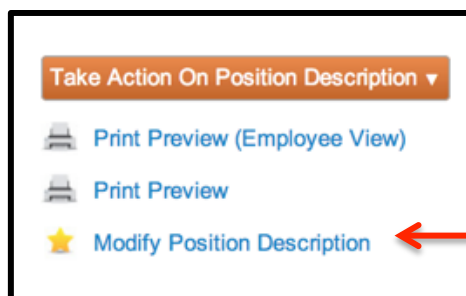
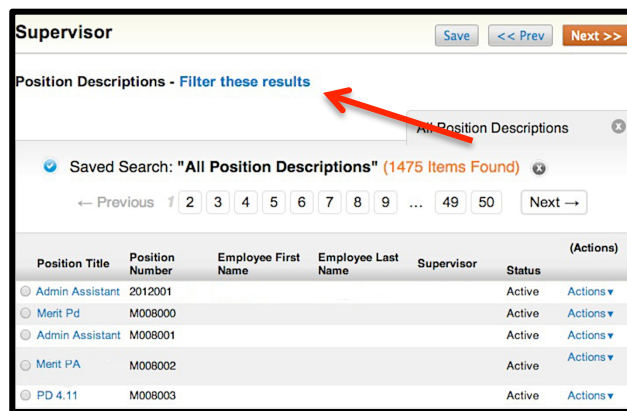4. Click **Start** on the following page to begin the modifying process.

Quick Reference Guide: Updating a Supervisor on a Position Description

5. Click the **Supervisor** link found within the **Editing Position Request** menu.

Editing Position Request
- Action Justification
- Classification Selection
- Position Details
- Essential Physical Fun...
- Qualifications
- Verification
- Posting Position Details
- Applicant Documents
- **Supervisor**
- Position Documents
- Position Request Summary

6. Select the radio button associated with the **Position Description** to be seated as a **Supervisor**.

   Note: You can filter the **Position Descriptions** by clicking **Filter these results**. The name field is also helpful to find the correct person, however, do not use this only, as previous incumbents may be listed.
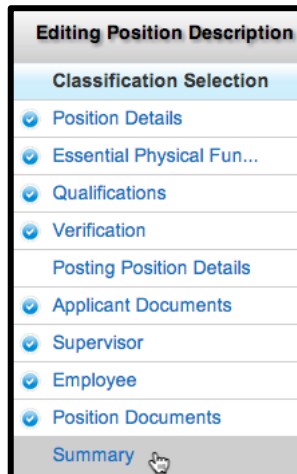
Supervisor   Save   << Prev   Next >>

Position Descriptions - Filter these results

All Position Descriptions

Saved Search: "All Position Descriptions" (1475 Items Found)

← Previous 1 2 3 4 5 6 7 8 9 ... 49 50 Next →

Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
Admin Assistant	2012001				Active	Actions ▾
Merit Pd	M008000				Active	Actions ▾
Admin Assistant	M008001				Active	Actions ▾
Merit PA	M008002				Active	Actions ▾
PD 4.11	M008003				Active	Actions ▾

Confirm the Supervisor's Position Description by clicking the Position Title, which will open the full PD in a new tab.

7. Click **next** to finalize the supervisor.

8. Click the **Position Request Summary** section.

9. Hover over **Take Action on Position Description** and select the appropriate workflow action.

Editing Position Description
- **Classification Selection**
- Position Details
- Essential Physical Fun...
- Qualifications
- Verification
- Posting Position Details
- Applicant Documents
- Supervisor
- Employee
- Position Documents
- Summary

Note: In order for the position request to be finalized, it must be approved by UHR.
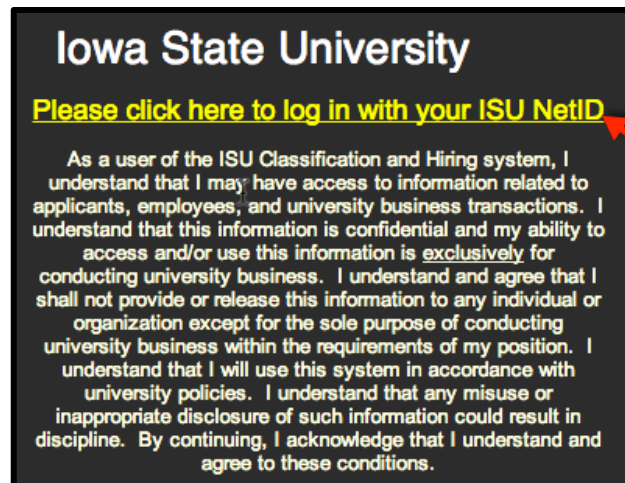
Quick Reference Guide: Updating a Supervisor on a Position Description

You should see a green bar appear at the top of the page. A green bar means the **Position Description** has successfully been routed for review. The Current status will also change from **draft** to the appropriate workflow step. If you see a **red bar** the action you were trying to take was unsuccessful, go back and review the noted sections.
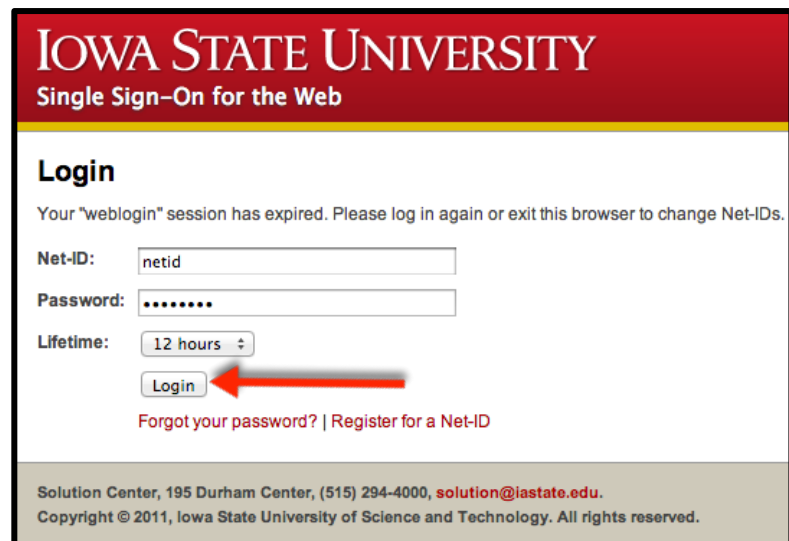
Quick Reference Guide: Finding a PD in PeopleAdmin7

Instructions: Use the following steps to log into ISU's Classification and Hiring System, PeopleAdmin7 and view a Position Description (PD). You will need your ISU Net-ID and password to log in to the HR Portal. If you are unsure of your username/password, please contact the Solution Center (515-294-4000). Refer to **Understanding the PeopleAdmin Interface Job Aid** for more detailed descriptions.

1. Open a **web browser** (e.g. Internet Explorer, Safari, Firefox, Chrome).

2. **Navigate** to www.iastatejobs.com/hr.

3. Click the yellow link "**Please click here to log in with your ISU Net-ID**".

4. Enter the first part of your **ISU Email address** as your Net-ID.

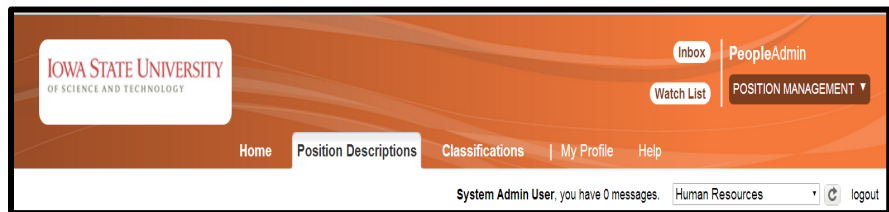5. Enter your **email address password** in the password field.

6. Click **Login**.

You are now logged into **PeopleAdmin 7**.

Quick Reference Guide: Finding a PD in PeopleAdmin7

7. Toggle to the **Position Management** module on the upper right hand dropdown.
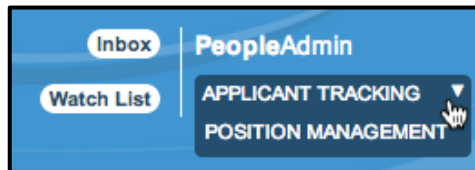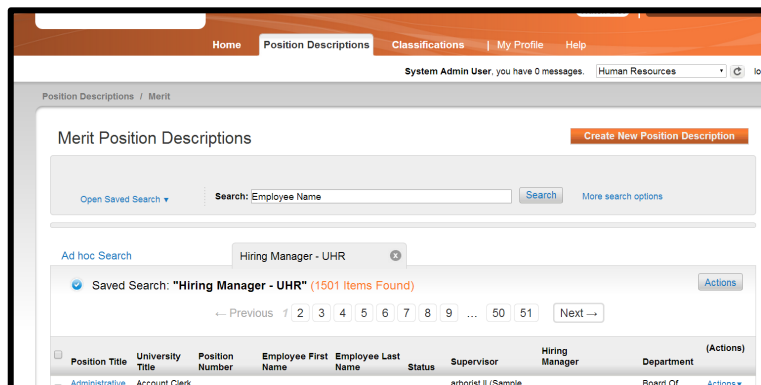
8. Click the relevant **position type** (e.g. Merit or P&S) under **Position Descriptions**.

9. Enter the **name** or **position number** and click "**search**".

10. Click the **blue underlined title** to view the Position Description.

11. Click the **back button** to return to the search.

To log out, click the **LOGOUT** link on the upper right hand side.

Generating Reports

Purpose: Use this guide to understand and generate reports in PeopleAdmin7 (PA7) regarding postings and position descriptions.

Posting Reports

To access posting reports for each position type, follow the steps below:

1. Log into PeopleAdmin 7 with your **ISU Net ID and Password** (ensure you are on the Applicant Tracking module)

2. Hoover over **Postings** and click the appropriate **position type**

3. **Locate** and open the posting

4. Click the **Reports** tab
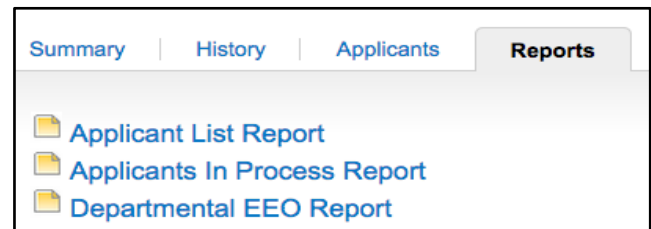
The table below explains the available report title and a description of the report result.

Report Title	Expected Result
Applicant List Report	View or download a list of applicants from the posting, including applicant rating, interview status, and final reason code (if applicable).
Applicants in Progress Report	View or download a list of applicants, separated by status (e.g. Under Review by Posting Admin, Rate Applicant, Approve for Interview, Not Interviewed, Interviewed Not Hired).
Departmental EEO Report	View or download a summary report of equal opportunity information candidates disclosed.

Generating Reports

Position Description Reports

To access position description reports for each position type, follow the steps below:

1. Log into PeopleAdmin 7 with your **ISU Net ID and Password**
2. Toggle to **Position Management** module
3. Hoover over **Position Descriptions** and click the appropriate **position type**
4. **Locate** and open the desired position description
5. Click the **Reports** tab

Quick Reference Guide: Viewing Direct Reports

Instructions: People Admin 7 is the ISU Classification and Hiring System. Use this Job Aid to log into People Admin 7 and to view the positions that you supervise. For more detailed training resources, navigate to peopleadmin.hrs.iastate.edu.

How to Log in to PeopleAdmin 7
Use the steps below to log into PeopleAdmin 7 (PA7) to view the positions you supervise.

1. Navigate to www.iastatejobs.com/hr
2. Click the Yellow banner at the top of the age that reads, "**Please click here to log in with your ISU NetID**"
3. You will be directed to an Iowa State portal
4. Enter your **NetID** and **password**
5. Click **login**.
6. Target or Toggle **Hiring Manager**
7. Click the Refresh Icon
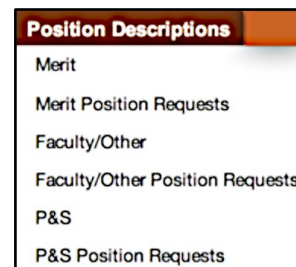
| Hiring Manager ⬍ | ↻ | logout |

Viewing Your Direct Reports
Follow these steps to view the position descriptions that report to you.

1. Select the **Position Management** Module in the upper right hand corner.

POSITION MANAGEMENT ▼
APPLICANT TRACKING
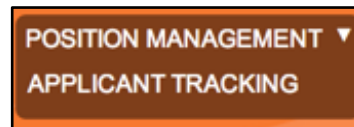
2. Hover over **Position Descriptions** and click **Merit** or **P&S** to view the positions you supervise.

Position Descriptions
Merit
Merit Position Requests
Faculty/Other
Faculty/Other Position Requests
P&S
P&S Position Requests

3. ⠀The listing will show your direct reports. If these are not correct, please contact your **HR Liaison** or reference **Updating a Supervisor Quick Reference Guide.**
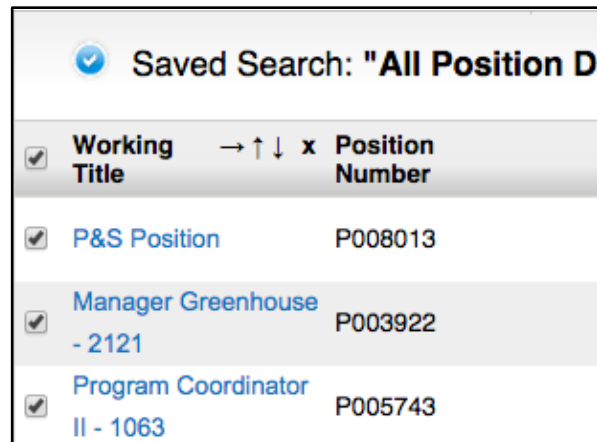
Position Descriptions / P&S

P&S Position Descriptions   Create New Position Description

Open Saved Search ▼   Search: Search   More search options

Ad hoc Search   All Position Descriptions ⊗

○ Saved Search: **"All Position Descriptions"** (2 Items Found)   Actions

Working Title	Position Number	Employee First Name	Employee Last Name	Status	Supervisor	Department	(Actions)
Program Coordinator II - 1063	P005743	Magann	Orth	Active		IT Services Adm- 26793	Actions▾
Magann PS PD	008010			Active		Ag Education/St- 01040	Actions▾

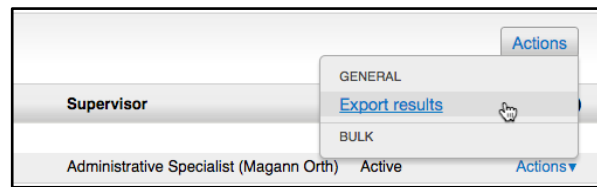# Quick Reference Guide: Viewing Direct Reports

Download a List to Excel

To view all position types that report to you in one report, follow the instructions below:

1. Select the positions that **report to you** in the **P&S** section

2. Hoover on **Actions** and select **Export Results**

3. Go to **Downloads** and view **Excel**
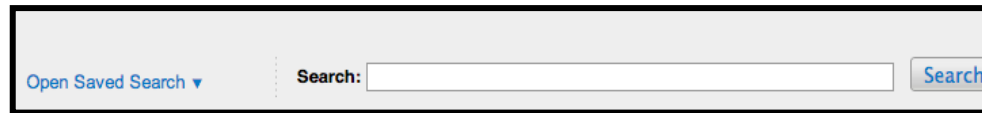
Repeat this process for all position types (e.g. Merit) you supervise. After each excel document is downloaded for all position types that you supervise, compile the information into one Excel spreadsheet by copying/pasting the rows.

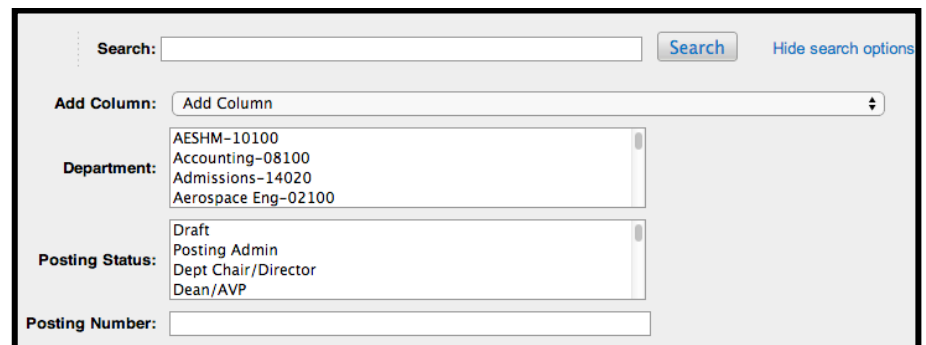# Quick Reference Guide: Saving a PeopleAdmin 7 Search

Instructions: Use the following steps to save a search. Searches are useful to limit or expand the amount of results within a position type. Every page that presents a list of items also provides search tools to help you find what you're looking for.

1. **Type** a search query in the search field.

   Note: Text search is not case sensitive.

   Open Saved Search ▼ Search: [   ] Search

2. Define a search by **adding or removing columns** from the posting or position description.

   Search: [   ] Search   Hide search options

   Add Column: Add Column   ⬍

   Department:
   AESHM-10100
   Accounting-08100
   Admissions-14020
   Aerospace Eng-02100

   Posting Status:
   Draft
   Posting Admin
   Dept Chair/Director
   Dean/AVP

   Posting Number: [   ]

3. **Sort** the position of columns by clicking on the arrows that appear when **hovering over** the column name.
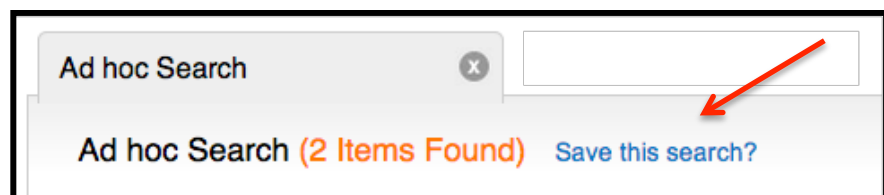
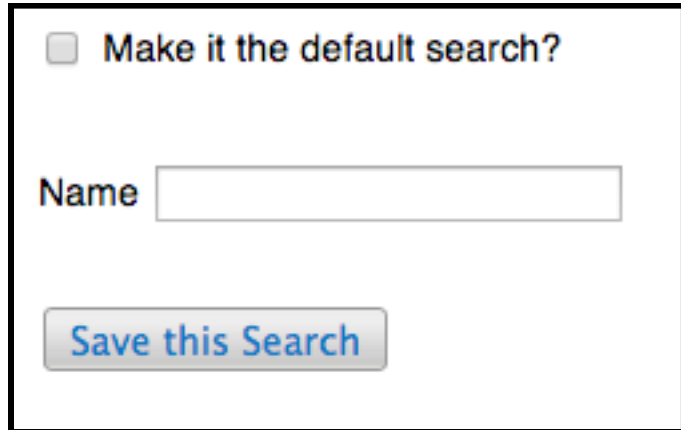 | ☐ | Position Title | Posting Number | ← → ↑ ↓ X |
   |---|---|---|---|
   | ☐ | Extension Program Assistant I | 40007M | |
   | ☐ | Secretary III for World Cultures Dept. | 40004M | |

   Right or Left Arrows: rearrange the columns.
   Up or Down Arrows: Change the sort to ascending or descending.

4. Click **save this search** to retain the search criteria and table format.

   Ad hoc Search   ⊗   [   ]

   Ad hoc Search (2 Items Found)   Save this search?

Quick Reference Guide: Saving a PeopleAdmin 7 Search

5. **Name** the search and select whether it is saved as the default search for the position type.

☐ Make it the default search?
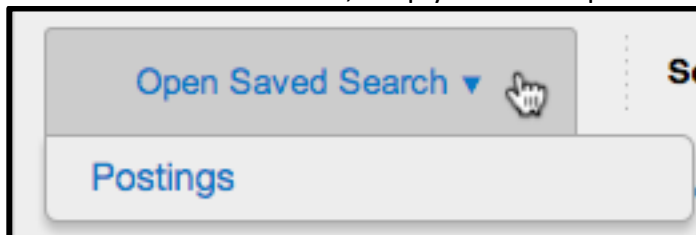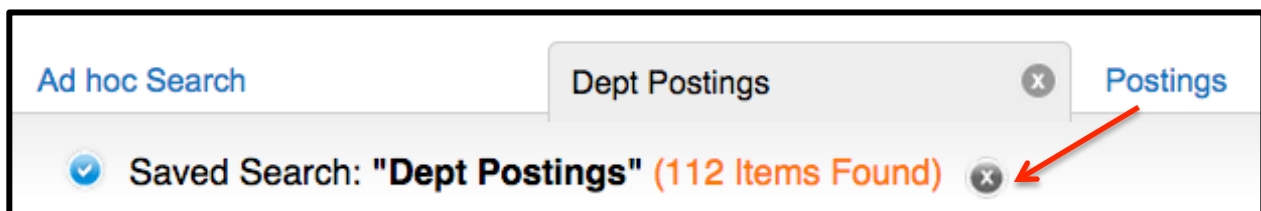
Name [   ]

Save this Search

To retrieve a saved search, simply select the position type and choose to **Open Saved Search**:

Open Saved Search ▼

Postings

To **remove** or **delete** a saved search you have saved, click the gray "X" (*as shown below*):

Ad hoc Search   Dept Postings   ⊗   Postings

✓ Saved Search: **"Dept Postings"** (112 Items Found) ⊗

Essential Physical Functions Tool

Purpose: Distribute this tool to the Supervisor of a position to define the Essential Physical Functions. The information from this tool will impact the Essential Physical Functions tab within a position description within People Admin 7.

What are Essential and Non-Essential Functions?
Essential functions are the basic job duties that an employee must be able to perform, with or without reasonable accommodation. Non-essential functions are important to the position; however, could be redesigned or reassigned to other employees, if necessary. A supervisor should carefully examine each position to determine which functions or tasks are essential to performance or non-essential.

Uses of the Essential Functions
A supervisor's judgment as to which functions are essential and the written job description will be considered in matters involving the following:
- workplace accommodation process,
- workers' compensation,
- Family Medical Leave Act,
- performance management,
- organizing work units, and in
- investigations by third parties as it relates to litigation and/or claims of discrimination.

Essential functions should be reviewed periodically to determine if they have changed or evolved over time. If you have questions on disability issues or the completion of the job description, please contact UHR at 294-4800.

Physical Demand Factors

Sedentary: Exerting up to 10 lbs. of force occasionally and/or a negligible amount of force frequently to lift, carry, push, pull or otherwise move objects, including the human body.

Light: Exerting up to 20 lbs. of force occasionally, and/or up to 10 lbs of force frequently, and/or a negligible amount of force constantly (constantly: activity or condition exists 2/3 or more of the time) to move objects. Physical demand requirements are in excess of those for Sedentary work.

 Medium: Exerting 20 to 50 lbs. of force occasionally, and/or 10 to 25 pounds of force frequently, and/or greater than negligible up to 10 lbs. of force constantly to move objects. Physical Demand requirements are in excess of those for Light Work.

Heavy: Exerting 50 to 100 lbs. of force occasionally, and/or 25 to 50 lbs. of force frequently, and/or 10 to 20 lbs of force constantly to move objects. Physical demand requirements are in excess of those for Medium work.

Very Heavy: Exerting in excess of 100 lbs. of force occasionally, and/or in excess of 50 lbs. of force frequently, and/or in excess of 20 lbs. of force constantly to move objects. Physical demand requirements are in excess of those for heavy work.

Circle the correct description:

Lift:	Sedentary	Light	Medium	Heavy	Very Heavy
Push (Quantity):	Sedentary	Light	Medium	Heavy	Very Heavy
Pull (Quantity):	Sedentary	Light	Medium	Heavy	Very Heavy

Essential Physical Functions Tool

Physical Demands Functions

Occasionally: Activity or condition exists up to 1/3 of the time.

Frequently: Activity or condition exists from 1/3 to 2/3 of the time.

Constantly: Activity or condition exists 2/3 or more of the time

Circle the correct description:

Kneel:	Not Applicable	Occasionally	Frequently	Constantly
Crouch:	Not Applicable	Occasionally	Frequently	Constantly
Crawl:	Not Applicable	Occasionally	Frequently	Constantly
Climb:	Not Applicable	Occasionally	Frequently	Constantly
Sit:	Not Applicable	Occasionally	Frequently	Constantly
Stand:	Not Applicable	Occasionally	Frequently	Constantly
Walk:	Not Applicable	Occasionally	Frequently	Constantly
Carry:	Not Applicable	Occasionally	Frequently	Constantly
Push (Frequency):	Not Applicable	Occasionally	Frequently	Constantly
Pull (Frequency):	Not Applicable	Occasionally	Frequently	Constantly
Bend:	Not Applicable	Occasionally	Frequently	Constantly
Balance:	Not Applicable	Occasionally	Frequently	Constantly
Reach:	Not Applicable	Occasionally	Frequently	Constantly
Handle/Grasp:	Not Applicable	Occasionally	Frequently	Constantly
Finger:	Not Applicable	Occasionally	Frequently	Constantly
Repetitive Motion:	Not Applicable	Occasionally	Frequently	Constantly
Speak:	Not Applicable	Occasionally	Frequently	Constantly
Hear:	Not Applicable	Occasionally	Frequently	Constantly
See:	Not Applicable	Occasionally	Frequently	Constantly

Routing and Approvers in PeopleAdmin 7

Routing in PeopleAdmin 7 (PA7)						
When I receive an action for the noted position type, I should route to…	**New PD**	**Modify PD**	**New Posting**	**Posting Please Review**	**Interview Approval**	**Hiring Proposal**
	Hiring Manager=PD side **ONLY**		**Posting Admin**=Posting side **ONLY**			
Merit						
Merit Temporary						
P&S						
P&S Temporary/Emergency						
Faculty/Other						

Notes / Special Circumstances:

People In PA7 Approver Groups					
Dept Chair/Director	**Dean/AVP**	**President/Senior VP**	**HR Liaison**	**UHR Recruitment Representative**	**UHR Class/Comp Representative**
			*All actions must be approved by the HR Liaison and submit to UHR.		
Proxy:	Proxy:	Proxy:			

Notes / Special Circumstances: