Position Management (PM) – Creating a Position Description (PD)

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This is the backbone of the system and should be loaded with as much of the position description and Banner information as possible, since this area is the driving force behind the final hiring proposals to create or approve EPAFs and offer letters.
FORMATTING SHORTCUTS & STANDARDIZED LANGUAGE

This is just a sampling for full list go to...

<table>
<thead>
<tr>
<th>Shortcuts</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>p.(space)text</td>
<td>This is a spaced paragraph</td>
</tr>
<tr>
<td><em>text</em></td>
<td>Bold Text</td>
</tr>
<tr>
<td>*(space)text</td>
<td>Bullet added to this line, repeat for each line needing a bulleted list</td>
</tr>
<tr>
<td>#(space)text</td>
<td>Number added to this line, repeat for each line needing a numbered list, do not add and a line break or additional return this will restart the numbering system</td>
</tr>
<tr>
<td>**(space)text</td>
<td>Bulleted list inside another bulleted or numbered list</td>
</tr>
<tr>
<td>###(space)text</td>
<td>Numbered list within another numbered or bulleted list</td>
</tr>
<tr>
<td><em>text</em></td>
<td>Italic text</td>
</tr>
<tr>
<td>(R)</td>
<td>Registered Trademark symbol</td>
</tr>
<tr>
<td>Extra Return</td>
<td>Stops numbered or bulleted lists</td>
</tr>
<tr>
<td>Contact info for email hyperlink for Field (For questions regarding this position, please contact: )</td>
<td>XXXXX at 406-994-XXXX or &lt;a href=&quot;mailto:xxxxxx@montana.edu&quot;&gt;<a href="mailto:xxxxxx@montana.edu">xxxxxx@montana.edu</a>&lt;/a&gt;</td>
</tr>
<tr>
<td>Equivalency Statement</td>
<td># Combination of education and/or applicable experience equivalent to a Bachelor’s Degree in XXXX or other related field or experience in XXX.</td>
</tr>
<tr>
<td>MT DL language (Position Special Requirements/Additional Information)</td>
<td>Must possess currently or be eligible to obtain a valid State of Montana Driver’s license and have an acceptable driving record (less than 12 points).</td>
</tr>
<tr>
<td>Physical Demands</td>
<td>To perform this job successfully, an individual must be able to perform each essential duty satisfactorily with or without reasonable accommodations. The requirements listed above are representative of the knowledge, skill, and/or ability required.</td>
</tr>
<tr>
<td>Position Special Requirements/Additional Information</td>
<td>This job description should not be construed as an exhaustive statement of duties, responsibilities or requirements, but a general description of the job. Nothing contained herein restricts Montana State University’s rights to assign or reassign duties and responsibilities to this job at any time.</td>
</tr>
</tbody>
</table>

For Special Requirements Field <_> starts command </_> ends command

<b></b> Creates bold text
<i></i> Creates italic text
<p></p> Creates a new paragraph
<p align="left"> Aligns a paragraph to the left (default), right, or center.
<br> Inserts a line break
<blockquote></blockquote> Indents text from both sides
<ol></ol> Creates a numbered list
<ul></ul> Creates a bulleted list
<li></li> Precedes each list item, and adds a number or symbol depending upon the type of list selected
CREATE A NEW POSITION DESCRIPTION

When you first log on, the Applicant Tracking module (ATS) (blue) first appears.

- In the upper right corner, select Position Management module (PM) (orange)

Roles that have the authority to create a position:
- Originator
- Hiring Authority
- HR Rep
- Human Resources

Ensure you are logged in as the appropriate role
Use drop down arrow to select the appropriate role, screen will automatically refresh with new view.
DO NOT USE SHORTCUTS ON THE HOMEPAGE, shortcuts are only for Postings not Position Descriptions.

Click on Position Descriptions and select “Staff”

To create a new position description, click on the “Create New Position Description” button
Enter the **Working Title**

The three fields under the **Organizational Unit section** are **required** fields; the field cannot be left as “Please Select”; you will receive an error message and will not be able to advance to the next step

- **Location** – click the drop down and make a selection

- **Division** – click on the drop down and make a selection

- **Department** – click on the drop down and make a selection

- **Click on “Start Position Request”**
For building a position that you already have a similar approved position there is the **clone** option
Select the position that you wish to clone
If multiple pages of positions use **Filter these results**

Enter the known search parameters and hit search
Will be limited to position within your authority group
Should you need one outside of your group contact helpdesk for support

Once position is selected use **Start Position Request**
All information from cloned position move over make sure to update with current information
POSITION DETAILS

- Enter the Justification of Need (this is a required field). Enter the explanation of why the position is being built or modified.
  - Note: please be detailed in the Justification. Examples:
    - Employee Name retired/resigned; request to refill vacancy.
    - Creation of new position. New position has been approved by xxxx for Fiscal Year xxxx.

Proposed Salary Range is required for contracted positions to aid in classification, classified or pay plan positions this field is optional, but gives idea of what department budget is prepared for.

Approved Salary Range will be filled out by Human Resources Comp-Classification.

- Number of Pays indicates how many paychecks will get over the payout of their wage/salary (9, 10 or 12)

- Click on the drop down menu for Contract Term and select the appropriate option.

- Union Affiliation is determined by the CBA’s, select appropriate union and Human Resources will verify.
Enter the **Position Number**, if known. If this is a new position, HR will classify the position and create the position number in Banner and enter it once the position has been created.

- **4M** indicates Classified Salary (*reports only exception hours*)
- **4N** indicates Classified Hourly (*reports everyday exact hours*)
- **4x2xxx** position numbers are for temporary hires, if permanent will need new number.

Click on the drop down menu for **Appointment Type** and select the appropriate option.

Click on the drop down menu for **Contract Type** and select the appropriate option.

Enter correct **FTE** (example 40 hours = 1.0 FTE)

Click on the drop down menu for **Time Entry** and select the appropriate option.

**Timesheet Orgn** is who will be approving the timesheet for this employee, this should be the Zxxxxx number from Banner.
LABOR DISTRIBUTION

- Add the Labor Distribution information by clicking on the Add Labor Distribution Entry button
- Enter the Index number
- Select the Account Number from dropdown.
  - Staff Classified 61125
  - Contracted 61124
  - Faculty 61123 (position type not currently built in PM)
  - NTT 61123N (position type not currently built in PM)
- Enter the % of distribution (all entries must equal 100%)
- If there is a split distribution, click on the Add Labor Distribution Entry to add as many entries as needed to equal 100% (the system does not calculate the total labor distribution)
- Enter the ORG
- To remove an additional entry, check Remove Entry?
- Click Next
POSITION DESCRIPTION

- Working Title

  Proposed Title: May need to be modified by HR

- Position Contact

  Whom can HR contact for questions?

- Department

  Training

- Role Within Department

  How does position fit into the department?
  Department Org Chart is required for uploaded internal Position Documents.

- Essential function of the position

  This field is required.
  Describe in 1-3 sentences:
  - Principal, main, major, or most important function of the employee’s job as a whole.
  - This may or may not be the function that requires the most time.

- Minimum Qualifications

  This field is required.
  - Minimum experience and/or education required for an applicant to be considered.
  - List 3 to 5 qualifications of the core competencies for the position.
  - Objective and measurable (experience-based and not subjective abilities or characteristics).

- Minimum Qualifications

  If a candidate does not possess we cannot even consider.
Preferred Qualifications not required but would enhance the positions capabilities.

Add appropriate ADA wording

Any additional demands that candidate would need to be aware of.

Add standard language

Add any additional special information needed regarding the position.

Even if this position has been empty for awhile please indicate last employee.

This position has supervisory duties? Pick yes or no from dropdown.

List the number of FTE that is being supervised.
Duties Detail is the tool for classification of the position.
Utilize this tool, enter each duty/responsibility, this is where you can be specific.
Select Add Duties Detail Entry to open these fields
Duty indicate the category of duty example: Customer Service or Finance
Duty Details can list all the detailed entries needed.
Duty Type dropdown for primary or secondary (to distinguish regular daily vs quarterly for example)
Average % of time estimation how much of their week would be spend doing this duty group.
The percentage of time for all duties combined must equal 100%. The system does not calculate the total percentage of time.
Use the Add Duties Detail Entry to keep adding different types of duties or primary from secondary.
This is a tool ONLY; the applicant will not see this information.
This can be printed off for a new employee, so they have a specific duties list.

If not recruiting immediately the rest of this page can be skipped select Next>>

Brief Position Overview is brief explanation to appear to the applicant when they first see the posting advertised.
According to University Communications, this should be 23 words or less (400 characters or less)
  o describe WWIFM (“What’s In It For Me?” as it relates to what’s in it for the candidate; why should they apply?)
Recommendation – make this language exciting so the viewer wants to see more and apply!
MONTANA STATE UNIVERSITY APPLICANT TRACKING SYSTEM (ATS) POSITION MANAGEMENT MODULE

- Brief summary of the Job and department.
- Enter the Duties and Responsibilities this area should be general for posting, for specifics use the Duties Details to make a complete list.

The Successful Candidate Will – enter the desired information into this section.
- Focus should be the “soft skills” that will need and interview or reference check to validate.

Click in the Originator box and select the appropriate person who will serve as the Originator for this action, if more than one is working on this there can be more than one that can be added.

Click in the Hiring Authority box and select the appropriate person who will serve as the Hiring Authority for this action. Be sure to know the requirements of your college for who should be Hiring Authority.

Note: if the employee who will serve in the roles of Originator or Hiring Authority are not in the drop down list, please have Dean’s office email ATShelpdesk@montana.edu to authorize addition of authority. The system may take up to ten minutes to update before the employees show as an option in the Originator and/or Hiring Authority fields.
FLSA DETAILS and CLASSIFICATION SELECTION

➢ **FLSA** is determined by Comp-Class this field will be viewable, but not editable.

➢ Classification should be added by Comp-Class, click **Next**

➢ If building for an incumbent select the classification title the current employee has
INTERNAL POSITION DOCUMENTS

- This allows the ability to attach any documents that are pertinent to this request (ie. – organizational chart, emails, any other documents). The applicant will NOT see these documents.
- To upload an organizational chart, hover on the down arrow by the word “Actions”, select:
  - Upload New
  - Create New
  - Choose Existing
  - Add by URL

Upload New:

- Name – will pre-populate; you are able to edit
- Description – enter a brief description
- Click on Choose File to upload from your computer
- Click Submit, this will start upload, continue on with the process while uploading.
- “Additional Document” – this provides the ability to attach any other documents that should be included for this request (ie – emails, additional notes, etc.)
- Click Next
POSITION SUPERVISOR and SUPPLEMENTAL QUESTIONS

- **This is currently not required**
- Select what position supervises the position you are requesting; click the circle next to the appropriate Working Title
  - Note: The supervisor position may not be listed as the system is new; if the appropriate supervisor position is not listed at this time, click next without selecting a position. Eventually, when all of the job descriptions are added to the system, the supervisory positions will be listed and can be added to the job description at a future date.
- Click Next

- For those rare positions that want/need to make sure that everytime the position is filled that specific questions be asked from the candidates, they can be added.
- Generally this would be skipped for the PD and added as needed to a vacancy.
SUMMARY

- The Summary allows you to review all of the entered information; you have the ability to edit any section by clicking on the **Edit** link to any of the sections.

- The green circle with a check mark indicates the section contains all of the required information.

- The orange circle with an exclamation mark indicates additional information is required in that section.
  - Click **Edit** to complete the section.

- If the Location, Department and/or Division needs to be changed, click the **Settings** tab.
  - Make any necessary changes for the Location, Division and/or Department
  - Click **Update Settings**
ORIGINATOR ROLE OPTIONS

In the **Originator** role, the following options are available in the **Take Action on Position Request** button once the information has been reviewed and is correct (Click on the drop down arrow to select the appropriate action):

- **Keep Working on the Position Request** – allows additional edits/additions/add notes.
- **Cancelled (move to Action Canceled)** – cancels the action (this does not delete the position from the system, merely deactives the position).
- **Send to HR Comp-Class or Send to HR Recruitment**
  - sends the position to HR for review and approval.

HIRING AUTHORITY ROLE OPTIONS

In the **Hiring Authority** role, the following options are available in the **Take Action on Position Request** button once the information has been reviewed and is correct (Click on the drop down arrow to select the appropriate action):

- **Keep Working on the Position Request** – allows additional edits/additions/add notes.
- **Cancelled (move to Action Canceled)** – cancels the action (this does not delete the position from the system, merely deactives the position).
- **Return to Originator (move to Originator)** – if the Hiring Authority wants changes, this option move the position back to the Originator to make the changes.
- **Note: the Hiring Authority has the ability to edit the position as well instead of sending it back.**
- **Send to HR Comp-Class or Send to HR Recruitment**
  - sends the position to HR for review and approval.
HR REP ROLE OPTIONS

In the HR Rep role, the following options are available in the Take Action on Position Request button once the information has been reviewed and is correct (Click on the drop down arrow to select the appropriate action):

- **Keep Working on the Position Request** – allows additional edits/additions/etc.
- **Cancelled (move to Action Canceled)** – cancels the action (this does not delete the position from the system, merely deactives the position).
- **Send to Hiring Authority (move to Hiring Authority)** – sends the position to the Hiring Authority for review and approval.
- **Send to HR (move to HR Review)** – sends the position to HR for review and approval.

Once an action has been selected, the following message box will appear:

- **Note: the Take Action language will vary depending on what action is selected.**
- Add any comments for the next user, if approving position type “Approved”
- If the box is checked below the comment box, this position will be added to your Watch List. This will enable you to check the status of the request.
- Click Submit

The blue bar indicates that the position was successfully transitioned and was added to the watch list.
- Click the Home tab
Changes to a Submitted Position Description

- If a position has been transitioned into ownership of another role, example above.
- Contact current owner to return it to you as Originator.

- Click on the working title to open.

- Click on Edit to start applying any changes.

- To add notes, but not transition to new ownership select Keep working...
- Make sure to transition to new ownership to complete the approval process.
WATCH LIST

- Scroll down to the Watch list

<table>
<thead>
<tr>
<th>Watch List</th>
<th>Position Requests (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Type</td>
</tr>
<tr>
<td></td>
<td>Current State</td>
</tr>
<tr>
<td></td>
<td>State Owner</td>
</tr>
<tr>
<td></td>
<td>Creator</td>
</tr>
</tbody>
</table>

- Click on the Position Requests tab
- Scroll down to the bottom; the position just created will be listed
- Title – indicates the title of the position created
- Type – indicates the type of position (Staff, Faculty, Student)
- Current State – indicates what user role the position currently resides with
- State Owner – indicates the current workflow state owner of the position
- Creator – indicates the person who created the position
- If the position has been placed in the Watch List, the Current State and State Owner will update as the position moves through the system.
REMOVING POSITION REQUEST FROM WATCH LIST

To remove a position from your Watch List:

- Click on the “Watch List”
- Check off the box of any actions that no longer need to be watched
- Select the correct unwatch option button
- Validation box confirms you wish to remove from watch list.
- Select OK
- The position will be removed from this area

- The upper bar indicates that the Posting was removed from your Watch List.
- When finished, click the **logout** button or close browser.
SEARCHING FOR POSITION DESCRIPTION

Once a Position request or modification has been started the Position will be found in **Staff Position Requests**

- Select Staff Position Requests (anything that has not gone through final approval will live here)
- Any Draft (started) positions will appear in this section instead of Staff
- View will be limited by your departmental and role authority
- Any historical approved versions will be viewable under **Staff Position Requests**

- Select Saved Searches dropdown and choose General Search, if that is not your current view
- There is a keyword search that will search for **Working Title**
- **More Search Options** will give more specific look up options

- Use Department, Position Number or use dropdown for Classification Title or Workflow State to narrow your search.
  - Position Number search does not always work, use in **Search** unless the position is approved, **once** approved use **Position Number** field.
MODIFYING POSITION DESCRIPTION

When changes are required on an approved position:

- Select Staff
- Search for the previously approved version of the position

- Select Modify Position Description

Start Modify Position Description Position Request on Training Position?

Once it has been started, this position request will lock the position description from other updates until the position request has completed.

- Warning and confirmation that request will lock the position and that you do want to modify.
- Select Start
- This will open the position for editing
- Once this is started the position will need to be selected from the Staff Position Requests section.
- If a Hiring Proposal is started on a position number no modifications are allowed until Hiring Proposal is accepted or declined.
- Under Position Justification please select reason for the modification, to aid Comp-Class or Recruitment in approving modification.
- Once all changes completed make sure to move to **Send to HR Comp-Class or Send to HR Recruitment** to complete the review.