

EHRA Non-Faculty Position Creation, Modification, Review and Reorganization

Monday, August 15, 2016 9:27 AM

Before creating or modifying an EHRA non-faculty position or proposing the reclassification of an existing SHRA position to EHRA non-faculty, all units, schools and divisions should consult the EHRA Non-Faculty Position Classification Guidelines to ensure that basic EHRA requirements are met. If these requirements are not met, the SHRA classification process should be pursued.

Changing Existing Positions

Any changes to the working title, reporting relationship, duties, or education/experience requirements of an existing vacant or filled EHRA non-faculty position must be reviewed to assess any impact to the assigned EHRA status. Significant changes may affect the position's continued eligibility for EHRA non-faculty status. Examples of significant changes include, but are not limited to

- no longer requiring a specific degree
- a major change in duties or reporting relationships
- substantially altering or eliminating experience requirements

HR will review any submitted modifications to determine if the position continues to satisfy current EHRA non-faculty classification guidelines. Changes require additional approval by UNC General Administration.

Reviewing Positions

All EHRA non-faculty positions must be reviewed periodically to determine whether they meet current EHRA non-faculty position classification guidelines and, therefore, whether the position's EHRA status may be continued. If an EHRA non-faculty position becomes vacant it is subject to mandatory review of EHRA status. A review may be initiated at an earlier time for a position at the request of the department or if HR determines that a prior EHRA approval was contrary to the prevailing UNC General Administration EHRA guidelines.

Tips for Justification/Explanation Content

This documentation helps flesh out why a newly created or previous position is important to a given organization.

1. Make sure you can justify why this position or change is necessary. You may, for instance, feel that establishing this job will help the university cut costs. But don't stop there: there are other justifications besides cost.
 - a. When justifying a salary related change such as career progression increase or reclassification, please be sure to include how the position has increased in difficulty and/or complexity, not an increase in volume of the same work.
 - b. Give a brief outline of the change in the Explanation of Requested Change. Details for the new duties can be added in the Primary Duties and Responsibilities section.

2. When opening your job justification, the first thing you want to do is show how it will benefit the university. Those reading the proposal are primarily interested in the strategic accomplishment of the university. Get to the benefits right away when writing a job justification.
 - a. You can start by identifying an inefficiency or problem in the university that may need a solution. The consequences of the problem should be spelled out in detail, whether these are higher costs, poor quality, etc. If there's a role you know needs filling, for example, you can point that out right away. You can also use some research here to backup your claims.
 - b. Highlight what of the university's current strategic goals this new or changing position is addressing and give details on how.

3. Summarize why the new position or change would be good for the university. Perhaps it fills in gaps not currently covered by existing staff or it frees up the time of others to concentrate more fully on their assigned tasks. If you envision financial savings through creation of the new role, provide a detailed analysis of how that will be achieved.

4. Include a short overview of new responsibilities, length of time the employee has been performing the new responsibilities, and what organizational changes have occurred to warrant the additional responsibilities.

NCA&T Salary Structure Referral Document

Thursday, March 17, 2016 5:22 PM

NCA&T Salary Structure Referral Document

Salary structure and compensation offered to employees exempt from the NC State Human Resources Act (EHRA) is market based. Setting and evaluating salaries for this group utilizes ranges developed from survey data using NC Board of Governor defined group peer data for each unique EHRA job category code. The ranges can be found online at:

<http://old.northcarolina.edu/hr/unc/classcomp/T1-Ranges-2017-2019.pdf>

<http://old.northcarolina.edu/hr/unc/classcomp/T2-Ranges-2017-2019.pdf>

http://old.northcarolina.edu/hr/hr_council/hrcouncil/EHRA_Professional_Salary_Ranges_FY_17-19_-_Updated_10-2-2017.pdf

A specific salary amount for an individual employee is based on a variety of factors, which are considered in totality by management. These factors include, but are not limited to:

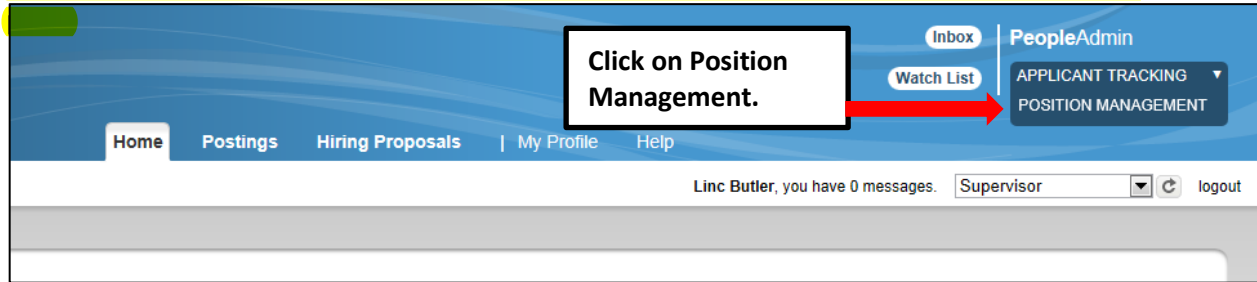
- Available budgetary resources
- Demonstrated employee knowledge, skills and experience.
- Employee performance and demonstrated accomplishments.
- Possession of an advanced degree or professional credentials that enhance the employee's ability to perform required or essential duties of the position.
- Scarcity and uniqueness of employee skills and abilities in the context of the relevant labor market.
- Equity and salary relationships to substantially equivalent incumbents within the employee's work unit, School/Division.

Instruction and salary setting guidance is found at:

http://old.northcarolina.edu/hr/hr_council/Attachment_E_-_FY_15-16_SAO_Salary_Range_Instructions_and_G.pdf

Modify Position Description – EHRA

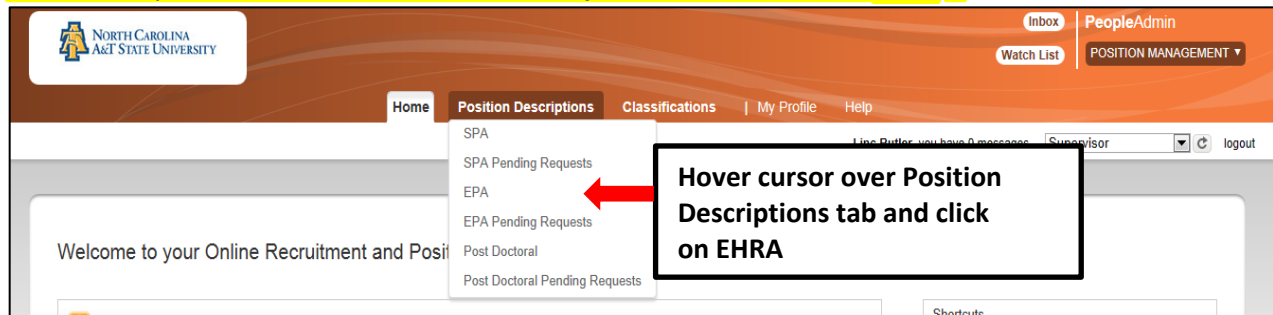
To initiate a Modify Position Description request for an EHRA position, first switch to the Position Management module using the drop down menu located in the top right corner of the



Once in the Position Management module, make sure you have the necessary active user type. Remember: only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a Modify Position Description request:



Next, hover your cursor over the Position Descriptions tab and click on "EHRA":



In the Position Descriptions view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches for use again later.

Active user type is Supervisor.

Searches are customizable by position attributes and can be saved for later use.

List of position descriptions by active user type.

| Working Position Title | Position Number | Department | Position/Classification Title | (Actions) |
|-------------------------|-----------------|--|-------------------------------|-----------|
| EPA Position - 2 | 75767 | Intercollegiate Athletics | Assoc Director of Athletics | Actions |
| DHR EPA Position Test 1 | 12345 | Student Affairs | Admissions Officer | Actions |
| Director | | Compensation, Benefits & Position Management | Director | Actions |
| Assistant VC for HR | | Human Resources | Asst VC-Human Resources | Actions |

To initiate the request, select the position number you are modifying by clicking on the Working Position Title of the position.

To create a new position description, select the option above. To modify an existing position, select it from the list below by clicking on the working title. To narrow your search, enter a working title, a position number, or an employee name.

Ad hoc Search

Saved Search: "Ad hoc Search" (868 Items Found)

| Working Position Title | Position Number | Employee's Name | Supervisor | Status | Last Updated | (Actions) |
|---------------------------------|-----------------|-----------------|------------|--------|--------------|-----------|
| Chancellor/Professor | 000002 | | | Active | | Actions |
| Assistant To Chancellor | 000003 | | | Active | | Actions |
| VC Dev. and Univ Relations | 000005 | | | Active | | Actions |
| Vice Chancellor Bus and Finance | 000006 | | | Active | | Actions |
| General Counsel | 000010 | | | Active | | Actions |
| Director Of Purchasing | 000011 | | | Active | | Actions |

When the position description loads, click on "Modify Position Description" in the menu to the right.

Position Description: Assistant Director (EPA) Edit

Current Status: Active

Position Type: EPA

Section/Unit: Director Athletics

Created by: System Account

Take Action On Position Description

- Print Preview (Employee View)
- Print Preview
- View Supervisor
- Modify Position Description

[EHRA Modify - Position Action Justification Tab](#)

Home | Position Descriptions | **Classifications** | My Profile | Help

Amy Braun, you have 0 messages. Supervisor

Pending Requests / ... / Modify Position Description / Assistant Director / Edit

Editing Pending Request

Position Action Justification [Save] [Next>>]

✓ Check spelling

Select the requested position action. If a Title Change and/ or salary increase is requested, explain the factors influencing the request for review. The proposed effective date must be a future date, subject to change for payroll entry. The requested salary, if entered, must reflect a budgeted amount to be identified with a funding source and is subject to DHR and budget review and approval available.

* Required Information

Position Action Justification

Reason for Position Modification

- Add Position Details for Posting
- EPA Title Change with New Job Duties
- EPA Title Change - Other
- Funding Source Change
- FTE Change
- Position Conversion - 9 to 12 months
- Position Conversion - 12 to 9 months
- Change Reporting Relationship (Supervisor or Organization)
- Abolish Position
- Other - Explanation Required

This field is required.

Adding details in the “Explanation of Required Change” field (illustrated below) will expedite your request by helping other approvers and Human Resources reviewers understand the context for your request.

Explanation of Requested Change

Current EPA Position Title

If requesting an EPA Title Change, enter current EPA Title here

Proposed Effective Date

This field is required.

Basis for EPA Status

Modify only if requesting a change in EPA c

Requested Salary

If applicable, % increase requested

Position Request Number

[Save] [Next>>]

1. Select the reason(s) for the modification request.

Required fields highlighted in RED.

2. Describe why you are submitting the request.

3. Note Current Title if requesting change review

4. If requesting a budget /salary change, enter the next payroll date or date funding will be available

5. EHRA Positions should be described as Senior Administrative Officer, Faculty, Instructional, Research, or Public Service. If you have questions about whether a position role meets EHRA policy definitions, contact Classification/ Compensation.

6. Funding to support any budget change must be secured PRIOR TO initiation of the request.

“Save” and “Next>>” buttons.

EHRA Modify - Position Details Tab

Please note that the *first* time a position is modified in the system, there will be many required fields, but after a position has been approved, only the fields that *need to be revised* will have to be identified for editing.

The screenshot shows the 'Position Details' tab in a web application. The interface includes a navigation menu on the left, a main content area with various sections, and a right-hand sidebar with callout boxes. The callout boxes provide context for specific fields and sections:

- Who should be contacted if there are questions about the request?** Points to the 'Contact Information' section, which includes fields for Contact Name, Contact Phone Number, and Contact Email, all marked as required.
- If the position is a 12 month leave reporting position, enter proxy for leave approval** Points to the 'Proxy (For Leave Reporting)' section, which includes fields for Proxy Phone Number and Proxy Email.
- Current Employee's Information will be loaded here, or position will show "Vacant." Rank will load in with faculty positions; if posting for a different rank, please change. If non-faculty, skip this field.** Points to the 'Employee Information' section, which includes fields for Employee First Name, Employee Last Name, Banner ID, and Faculty Rank.
- Current Title or Classification Title just selected for modification review will show here.** Points to the 'Classification Information' section, which includes fields for Position/Classification Title, Job Code, and EPA Position Type.
- The Primary Purpose provides a basis for the recruitment posting.** Points to the 'Position Overview' section, which includes a field for Primary Purpose of Position.
- The Organizational Unit information should include factors such as department size, (number of employees/students, programs, degrees offered, and operating or grant budgets) which are helpful to an analyst for determining a position's scope.** Points to the 'Position Overview' section, which includes a field for Primary Function of Organizational Unit.
- If Time-Limited Full Time or Part Time is selected as Appointment Type, the budget end date for the earliest fund to end must be entered.** Points to the 'Position Information' section, which includes fields for Position Working Title, Position Number, Building and Room No., Appointment Type, and Appointment Length.

Current Title or Classification Title just selected for modification review will show here.

Detailed information in the Position Overview and Position Information sections assist the DHR Class & Comp Analyst in performing an accurate analysis of the position.

Who should be contacted if there are questions about the request?

If the position is a 12 month leave reporting position, enter proxy for leave approval

Current Employee's Information will be loaded here, or position will show "Vacant." Rank will load in with faculty positions; if posting for a different rank, please change. If non-faculty, skip this field.

The Primary Purpose provides a basis for the recruitment posting.

The Organizational Unit information should include factors such as department size, (number of employees/students, programs, degrees offered, and operating or grant budgets) which are helpful to an analyst for determining a position's scope.

If Time-Limited Full Time or Part Time is selected as Appointment Type, the budget end date for the earliest fund to end must be entered.

[EHRA Modify – Position Details Tab – Primary Responsibilities and](#)

Duties The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the *most important section* of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your position description request is not delayed by providing too little information about the job duties.

On an EHRA position **at least one of** the three categories of Instructional, Research, and Administrative must be selected to describe the primary responsibilities of the job. Many EHRA jobs may be comprised of a combination of duties in more than one of these categories, but entry of only one will meet the minimum requirement for a job description.

To enter duties, click on the key button, **“Add Primary Responsibilities and Duties Entry.”** A pull-down list of the three categories will allow you to select the primary function first. Type in duties and examples of assigned work relevant to the primary function, and assign an approximate percentage of all work time spent on those duties. If desired, repeat these steps to add categories in order to capture the most important duties assigned to the position.

Please Note: Each time the “Add Entry” button is clicked; you are taken back to the top of the Position Details Tab and will need to **scroll down** through the other sections again to see then location to add the new entry.

IMPORTANT: **Completion of at least one entry is required in order to move this request to the next step in the approval workflow.** The total percentage of time allocated for all categories should equal 100%:

Clicking **Add Primary Responsibilities and Duties Entry** opens this section to enable entry of duties:

EHRA Modify – Position Details – Compliance and Requirements

Completing the final position details fields identifies all required and preferred qualifications.

Supervisory

Does this position supervise? Please select This field is required. Select Yes or No from drop down list.

HELP TEXT: Supervisory positions conduct interviews, make final hiring decisions, provide salary recommendations, monitor and assign work, counsel and discipline employees under direct supervision, develop work plans and conduct performance appraisals for PERMANENT employees. If this position performs ALL of the ABOVE supervisory responsibilities, please indicate the following:

Percent of Time Spent

Number of Permanent Employees this Position Supervises

If Yes, then complete these fields.

Athletics

Is this position assigned to the department of Athletics or involved or associated with athletics, including but not limited to, responsibility for admission, certification of academic standing, evaluation of academic performance and administration of financial aid for student athletes? Please select This field is required. Question is required to ensure NCAA compliance.

Requirements and Preferences

Is this position considered an essential position? Please select This field is required. Information from this section is used to populate the job posting when it is time to recruit.

Minimum Experience/Education Bachelor's degree; or an equivalent combination of training and experience. All degrees must be received from appropriately accredited institutions.

Preferred Years Experience, Skills, Training, Education

Required License or Certification

Valid NC Driver's License required? Please select This field is required.

Commercial Driver's License Required? Please select This field is required.

Physical Required? Please select This field is required.

List any other medical/drug tests required

Complete this page by clicking on **Save** and Next>>

Save
<< Prev
Next >>

EHRA Modify - Position Funding Information Tab

In the **Funding Source Details** section of this tab, you will confirm existing or enter new fund sources to support the request. If you are modifying a position to change the funding source, you will need to type over any existing fund, account, program and org codes to replace the numbers with new codes. Click on the **Add Funding Source Details Entry** button to enter budget and other required codes.

If you are unsure of what fund to use, the most up to date information may be found in **Banner Finance** on these forms:

- 1) **FTVORGN**- Provides a list of Org Codes
- 2) **FTVFUND**- Provides a list of Funds
- 3) **FTVACCT**- Provides a list of Accounts

These forms show listings of all active funds. For additional help, refer to the Banner Training Guide. Select "Save" after each entry. PLEASE NOTE: The annual amount budgeted must equal the requested salary.

This section functions like the "Competencies and Related Job Duties" section in that each time you click to add another entry, you are taken up to the top of the funding information page. If you are revising or adding more than one funding source, you will need to scroll down below the first entry to revise or enter the second. If the position has more than one funding source, click on the **Add Funding Source Details Entry** button and "Save" until all sources have been entered. Once all funding sources have been added, click "Next>>" to move to the next tab:

This screenshot shows the 'Position Funding' section of a web application. A sidebar on the left lists navigation options, with 'Position Funding Infor...' selected. The main content area is titled 'Position Funding' and includes an 'IMPORTANT NOTE' box that says 'Remember to click "Save" after each funding source is entered.' Below this is the 'Funding Source Details' section, which contains instructions: 'Indicate the funding source(s) for this position. Select "SAVE" after each entry. Please note: If the position has more than one funding source entered. Each time you add an additional funding source. Click on Add Funding Source Details Entry.' A callout box points to the 'Add Funding Source Details Entry' button, stating 'Click here to add a funding source. If the position has more than one funding source, continue to click here until all funding sources are entered.' At the bottom right, there are 'Save', '<< Prev', and 'Next >>' buttons.

This screenshot shows the 'Additional funding source information' section of the form. It includes several fields with callouts:

- 'State Appropriated Funding / Non-State Appropriated Funding' with a 'Please select' dropdown. Callout: 'Select State or Non-State from drop down list.'
- 'If non-state, select source of funding:' with a 'Please select' dropdown. Callout: 'If Non-State, select funding source from drop down list.'
- 'Additional funding source information' with a text input field.
- 'Is this position partially or fully funded on ARRA stimulus monies?' with a 'Yes/No' dropdown.
- 'Budget Code' with a 'Please select' dropdown.
- 'Fund' (Format: 6 digit number 000000).
- 'Org' (Format: 5 digit number 00000).
- 'Account' (Format: 5 digit number 00000).
- 'Program' (Format: 2 digit number 00).
- 'Date Funds End' (Date input).
- 'Annual Amount' (Text input).
- 'Percentage of FTE' (Text input).

 A large callout box states: 'Enter or Revise funding source information. If you are not sure about fund/account/org numbers assigned to your department or the amount/type of funding available, refer to the Chart of Accounts or contact Budget and Planning. Submissions with incorrect information here will be returned to you and cause delays in reviewing and approving your request.' At the bottom, there are 'Remove Entry?' and 'Add Funding Source Details Entry' buttons, and a final callout box pointing to the 'Save' and 'Next>>' buttons: 'Complete this page by clicking on Save and Next>>'.

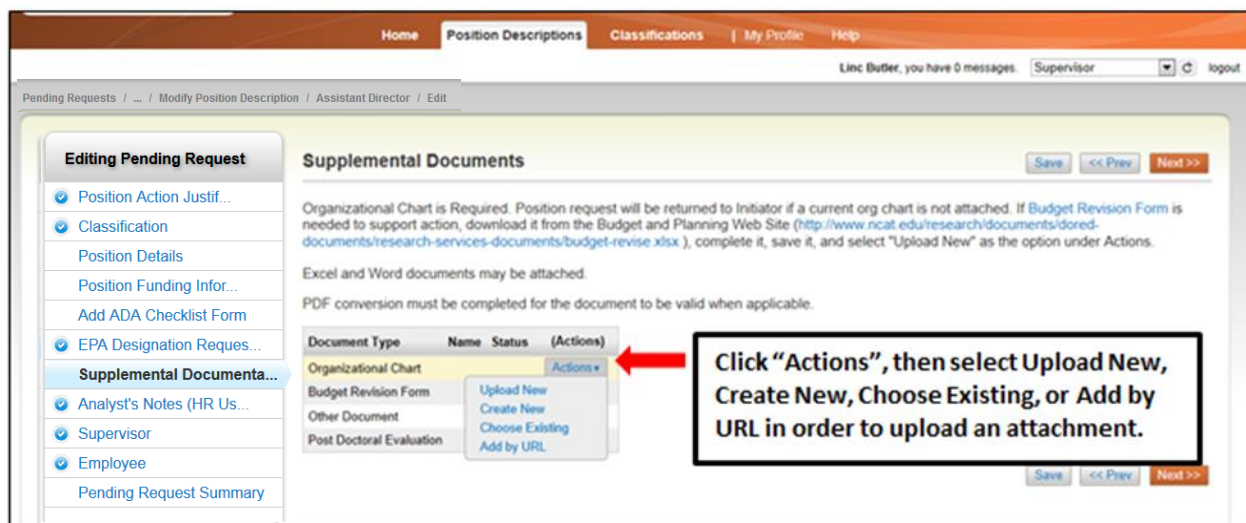
[EHRA Modify - Supplemental Documents Tab](#)

The **Supplemental Documents** Tab allows you to upload documents as attachments that will route with the request through the approval workflow. Attachments can be uploaded as follows:

- **Upload New:** Choose this option if you want to upload a file from your computer.
- **Create New:** Choose this option if you want to create a new file to attach using the PeopleAdmin editor.
- **Choose Existing:** Choose this option if you want to attach a file that has already been uploaded into PeopleAdmin as part of another action.
- **Add by URL (For Organizational Charts Only):** Choose this option if you wish to link to a file on the web by its URL.

The **Organizational Chart** is required. Position requests will be returned to the Initiator if a current organizational chart is not attached. If a Budget Revision Form is needed to support the request, you can download it from the Budget and Planning Web Site (<http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx>) complete it, save it, and select "Upload New" as the option under Actions.

Excel and Word documents may be attached. PDF conversion must be completed for the document to be valid when applicable:



The screenshot displays the 'Supplemental Documents' tab in a web application. The interface includes a navigation menu on the left with options like 'Position Action Justif...', 'Classification', 'Position Details', 'Position Funding Infor...', 'Add ADA Checklist Form', 'EPA Designation Reques...', 'Supplemental Documenta...', 'Analyst's Notes (HR Us...', 'Supervisor', 'Employee', and 'Pending Request Summary'. The main content area contains the following text:

Organizational Chart is Required. Position request will be returned to Initiator if a current org chart is not attached. If Budget Revision Form is needed to support action, download it from the Budget and Planning Web Site (<http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx>), complete it, save it, and select "Upload New" as the option under Actions.

Excel and Word documents may be attached.

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

| Document Type | Name | Status | (Actions) |
|--------------------------|------|--------|--------------------------|
| Organizational Chart | | | Actions* |
| Budget Revision Form | | | Upload New Create New |
| Other Document | | | Choose Existing |
| Post Doctoral Evaluation | | | Add by URL |

A red arrow points to the 'Actions*' dropdown for the 'Organizational Chart' row. A text box with a black border contains the instruction: 'Click "Actions", then select Upload New, Create New, Choose Existing, or Add by URL in order to upload an attachment.'

[EHRA Modify - Pending Request Summary Tab](#)

The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow.

Please review the details of the position summary carefully before continuing.

The **Blue Circle Check** appears by those tabs for which all required information has been entered:

Home Position Descriptions Classifications My Profile Help

Linc Butler, you have 0 messages. Supervisor logout

Pending Requests / ... / Modify Position Description / Assistant Director / Summary

Modify Position Description: Assistant Director (EPA) Edit

Current Status: Draft

Position Type: EPA Section/Unit: Director Athletics Created by: Amy Braun Owner: Amy Braun

Summary History Settings Reports

Position Action Justification Edit

Position Action Justification

Blue Circle Check

Click "Edit" to make edits to a tab.

| | | | |
|---|------------------|------------------|------------------|
| Additional workload in the area of classification and compensation has necessitated the creation of an additional position. | Currently: blank | Date | Requested Salary |
| | 08/01/2013 | Currently: blank | \$55,000 |

An **Orange Circle Exclamation Point** appears next to those tabs that have incomplete required fields. To edit tabs, click on "Edit" to the right of the tab title you want to edit and you will navigate directly to that tab. You can then make any necessary edits, click "Save", and then return to the **Pending Request Summary Tab** by clicking on the link in the left column:

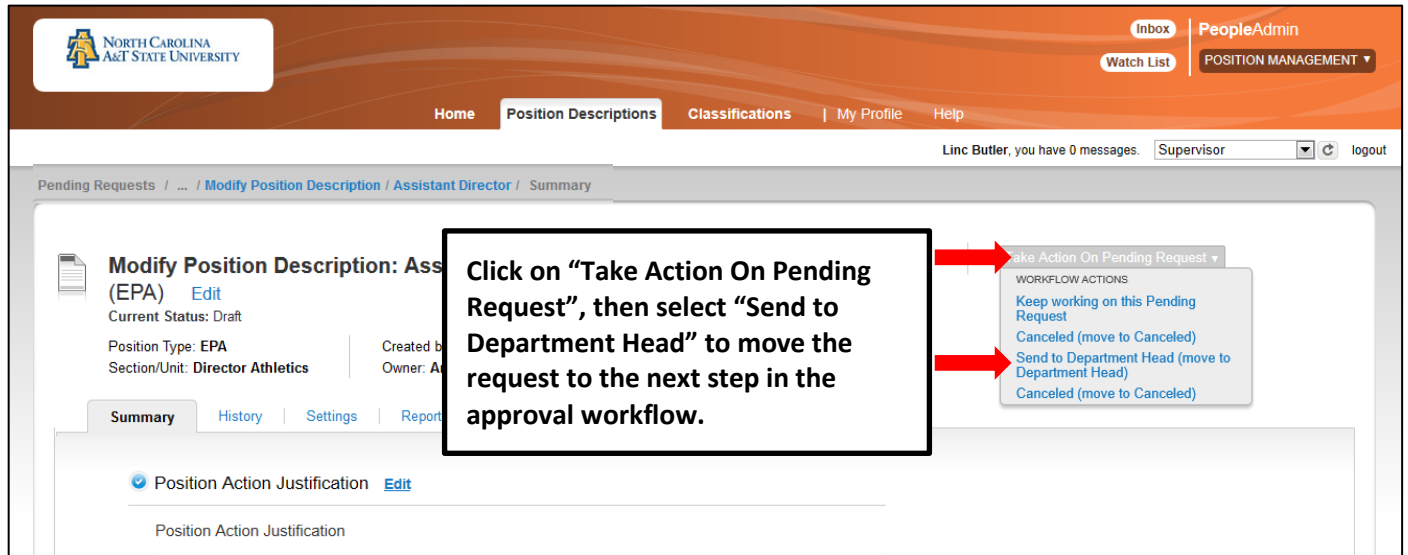
Position Details Edit

Orange Circle Exclamation Point

Click "Edit" to make edits to a tab.

| | |
|----------------------|---------------|
| Contact Phone Number | Contact Email |
|----------------------|---------------|

Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **“Take Action on Pending Request”** button and selecting the appropriate routing action. In this example, the appropriate routing action is **“Send to Department Head (Move to Department Head)”**:



You will then see the following **“Take Action”** box. You can enter comments in the **“Comments (optional)”** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you’re ready to send the action to the next level in the approval workflow, click the **“Submit”** button:

