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:

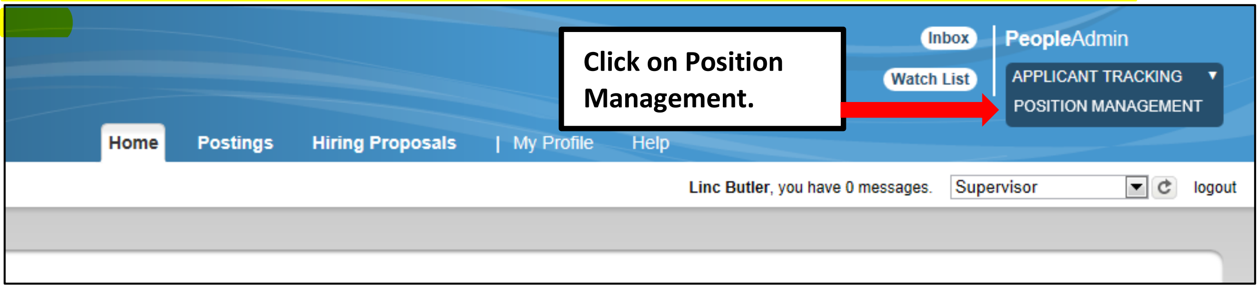
http://old.northcarolina.edu/hr/unc/classcomp/T1-Ranges-2017-2019.pdf
http://old.northcarolina.edu/hr/unc/classcomp/T2-Ranges-2017-2019.pdf
http://old.northcarolina.edu/hr/hr_council/hrcouncil/EHRA_Professional_Salary_Ranges_FY_17-19_-_Updated_10-2-2017.pdf

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:

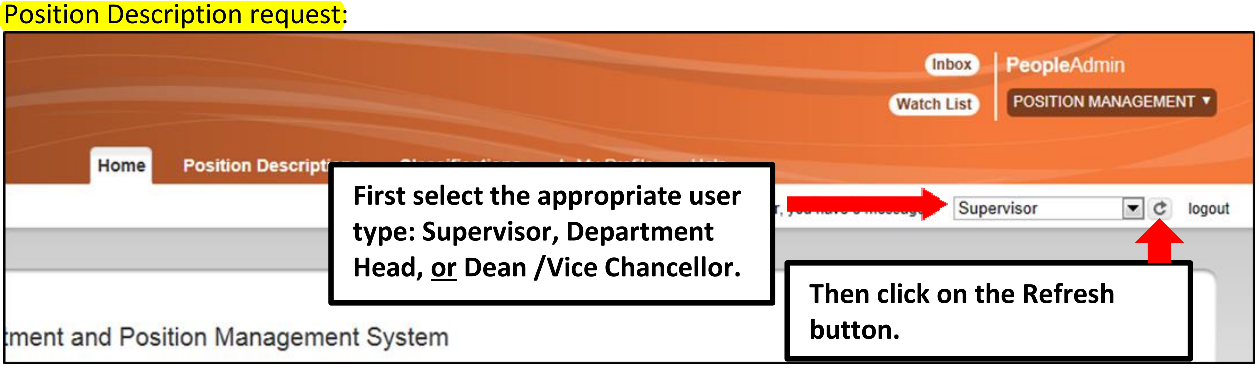
- Available budgetary resources
- Demonstrated employee knowledge, skills and experience.
- Employee performance and demonstrated accomplishments.
- Possession of an advanced degree or professional credentials that enhance the employee's ability to perform required or essential duties of the position.
- 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_SAAO_Salary_Range_Instructions_and_G.pdf

Modify Position Description – EHRA

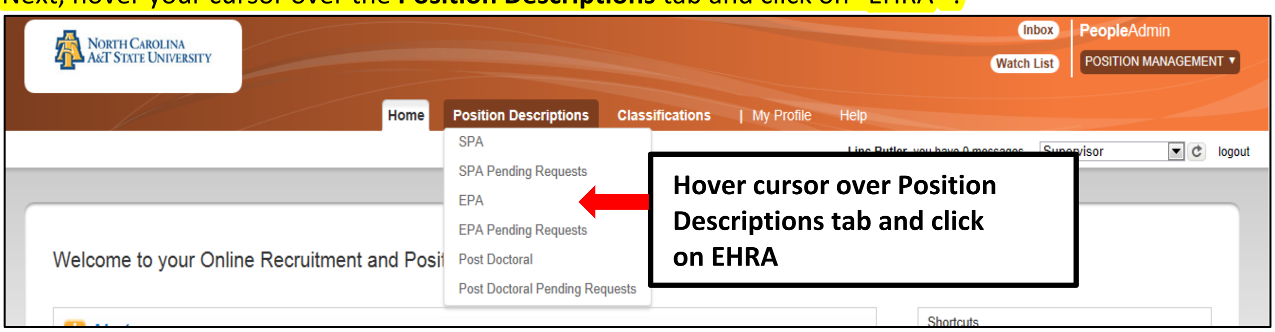
To initiate a Modify Position Description request for an EHRA position, first switch to the Position Management module using the drop down menu located in the top right corner of the



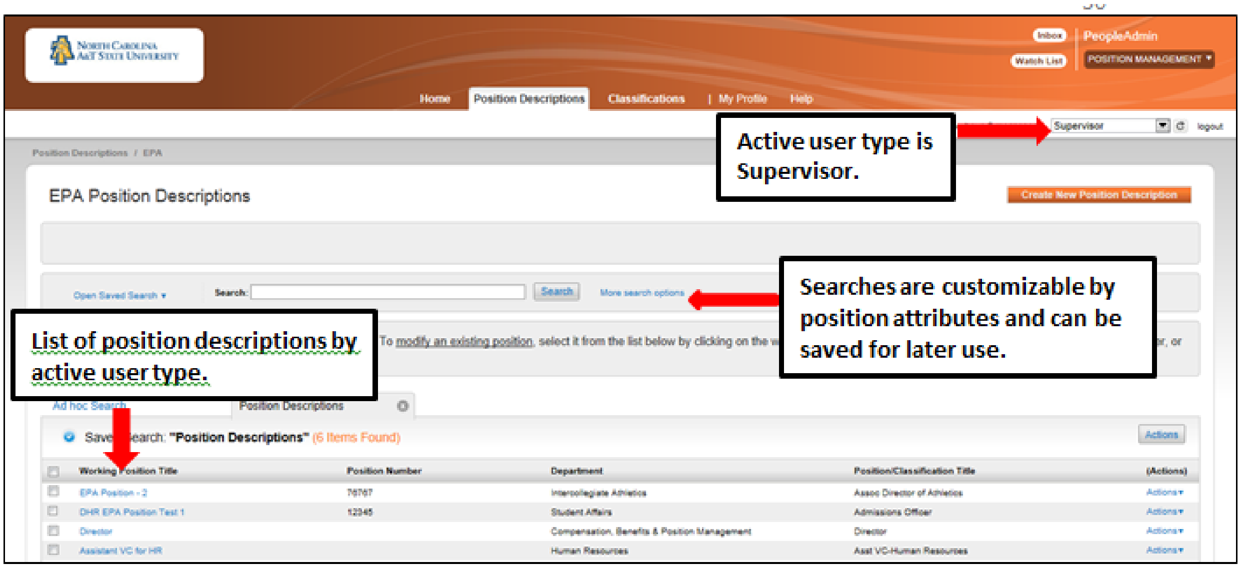
Once in the Position Management module, make sure you have the necessary active user type. Remember: only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a Modify Position Description request:



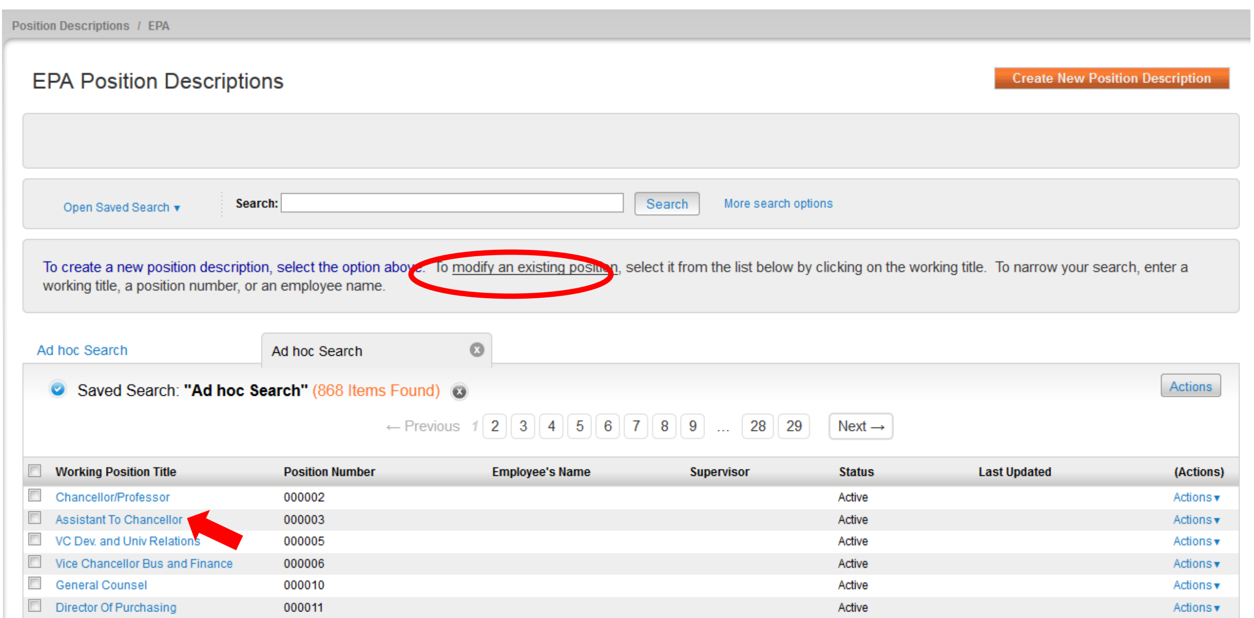
Next, hover your cursor over the **Position Descriptions** tab and click on "EHRA ":



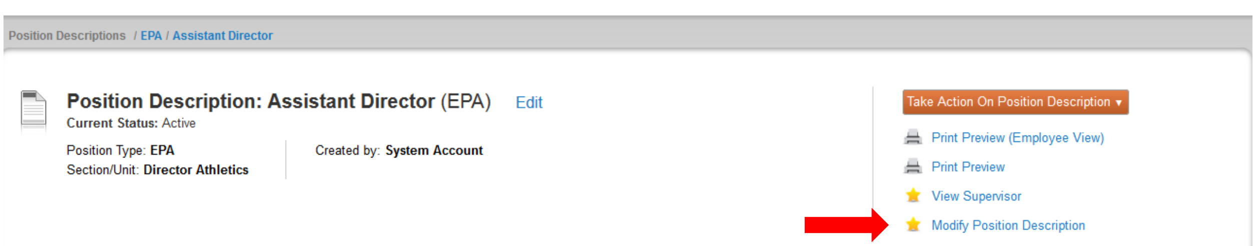
In the Position Descriptions view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches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



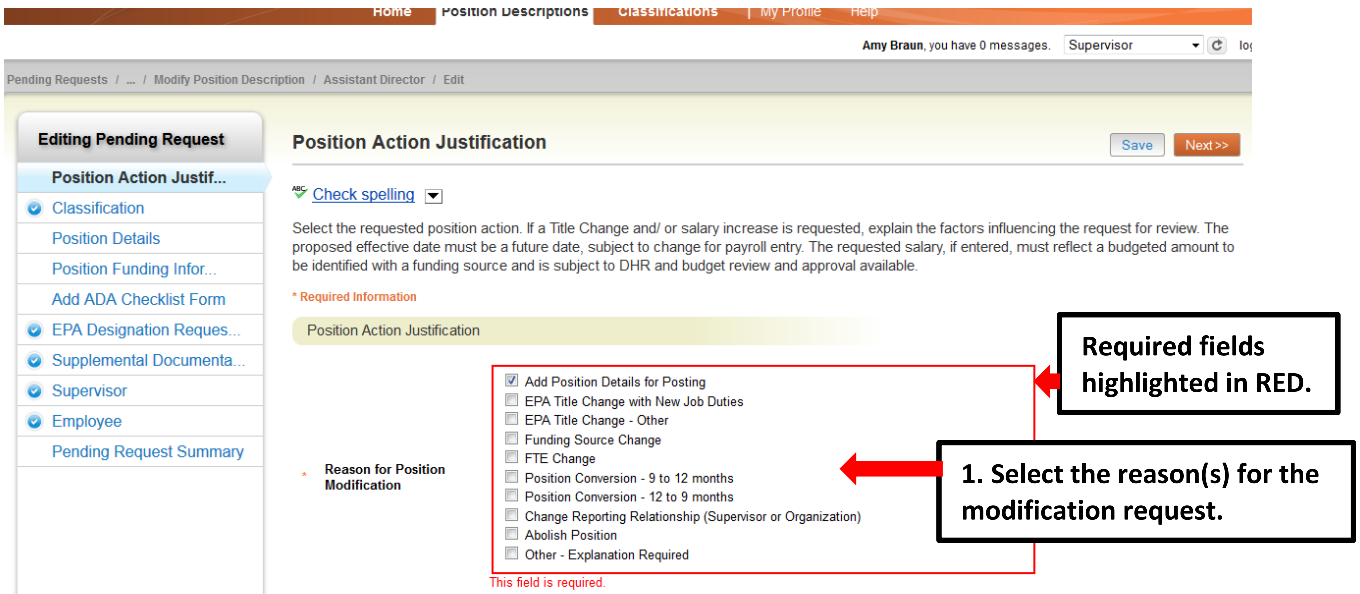
To initiate the request, select the position number you are modifying by clicking on the Working Position Title of the position.



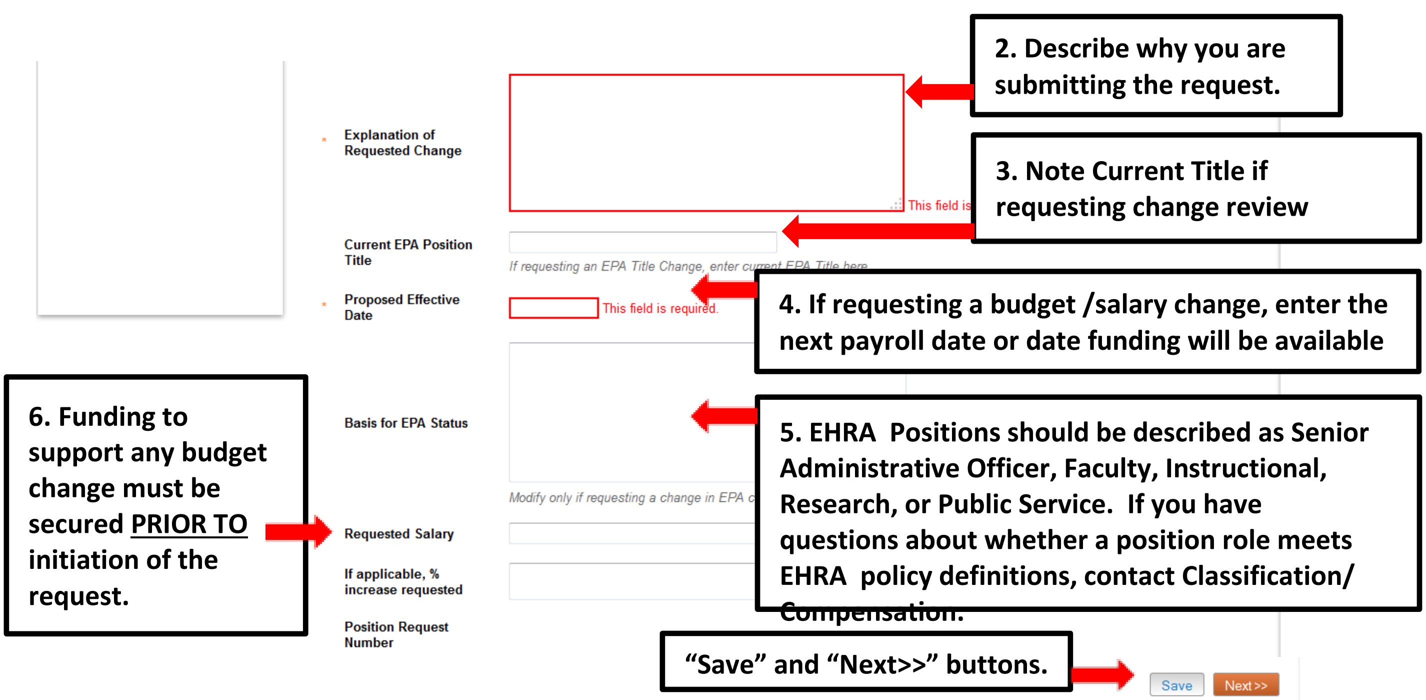
When the position description loads, click on "**Modify Position Description**" in the menu to the right.



EHRA Modify - Position Action Justification Tab

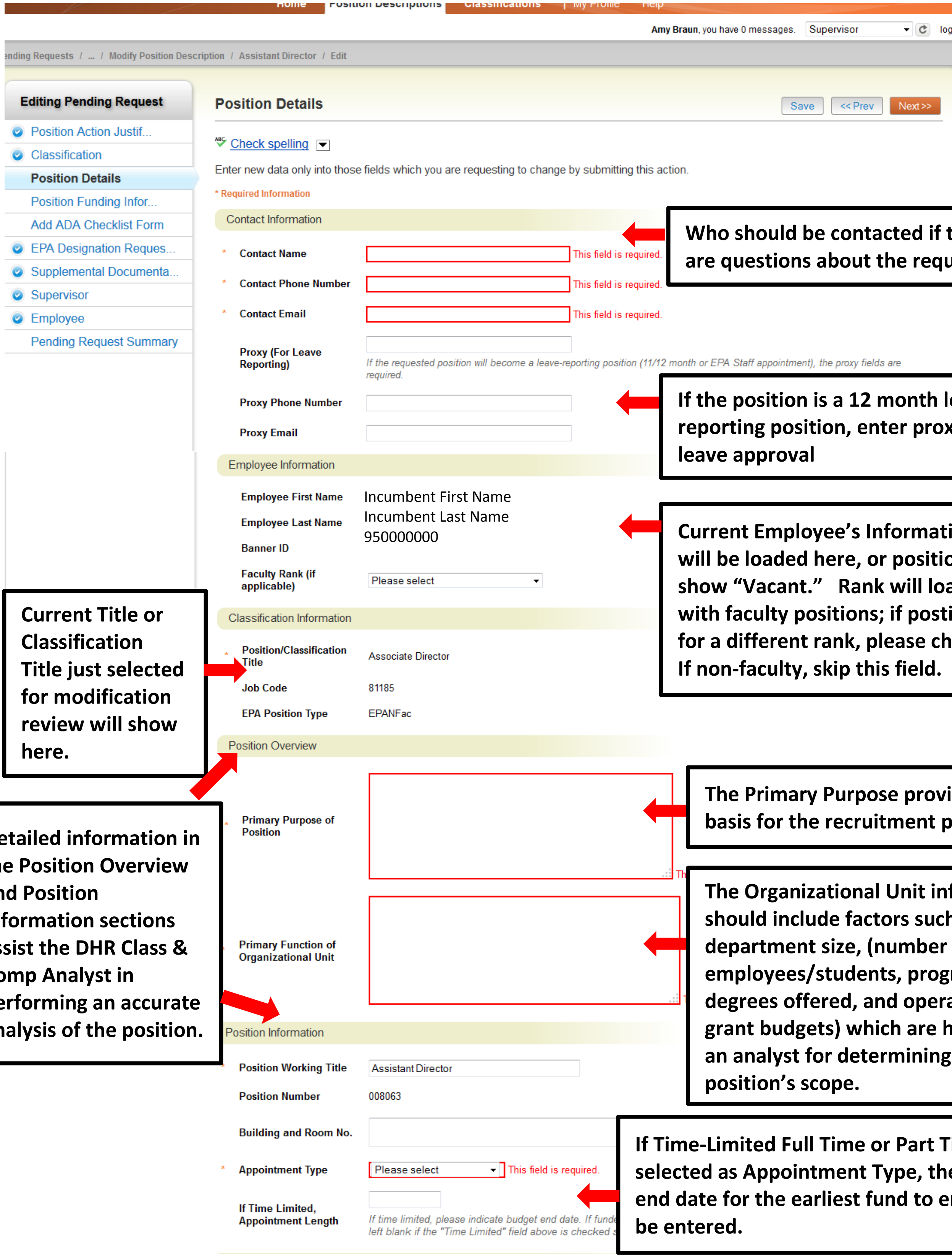


Adding details in the “**Explanation of Required Change**” field (illustrated below) will expedite your request by helping other approvers and Human Resources reviewers understand the context for your request.



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.



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.

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.

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

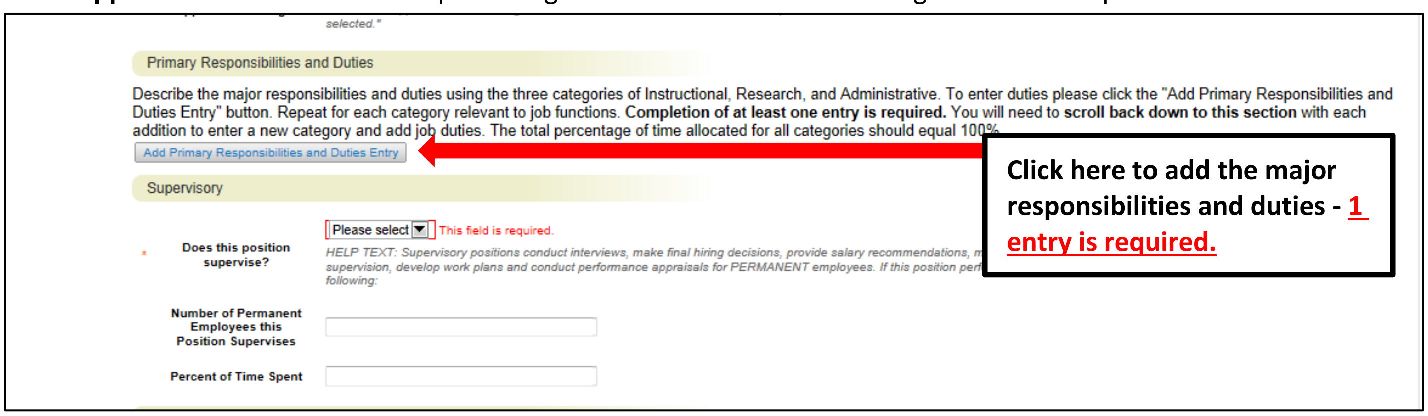
The next section of the Position Details tab is used to build **current duties and responsibilities** into the position. It is the *most important section* of a position description request, but easily missed by first-time users. Please read and follow all instructions in this area to ensure that your 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.

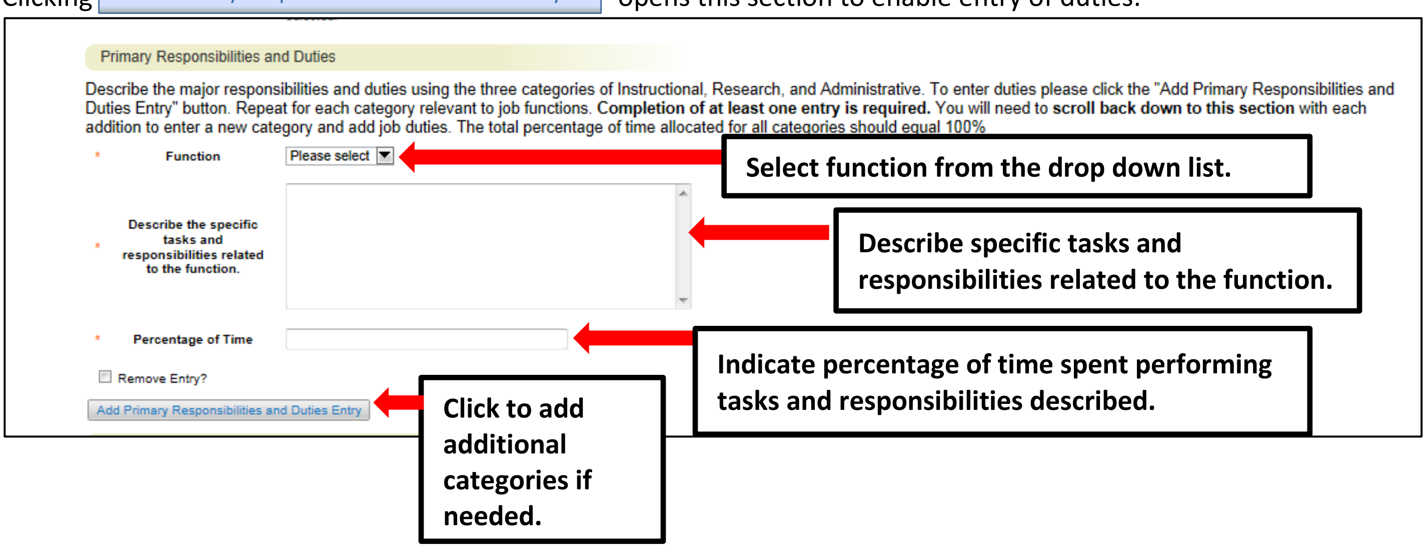
To enter duties, click on the key button, "**Add Primary Responsibilities and Duties Entry**." A pull-down list of the three categories will allow you to select the primary function first. Type in duties and examples of assigned work relevant to the primary function, and assign an approximate percentage 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%:

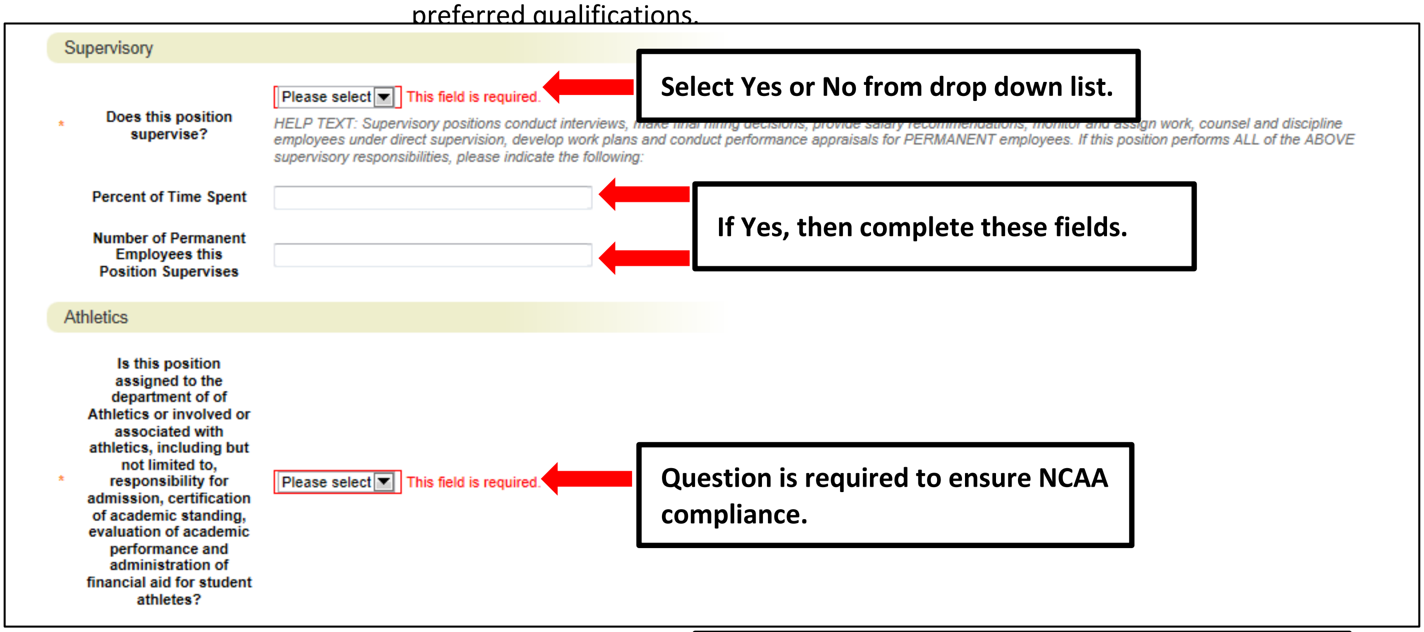


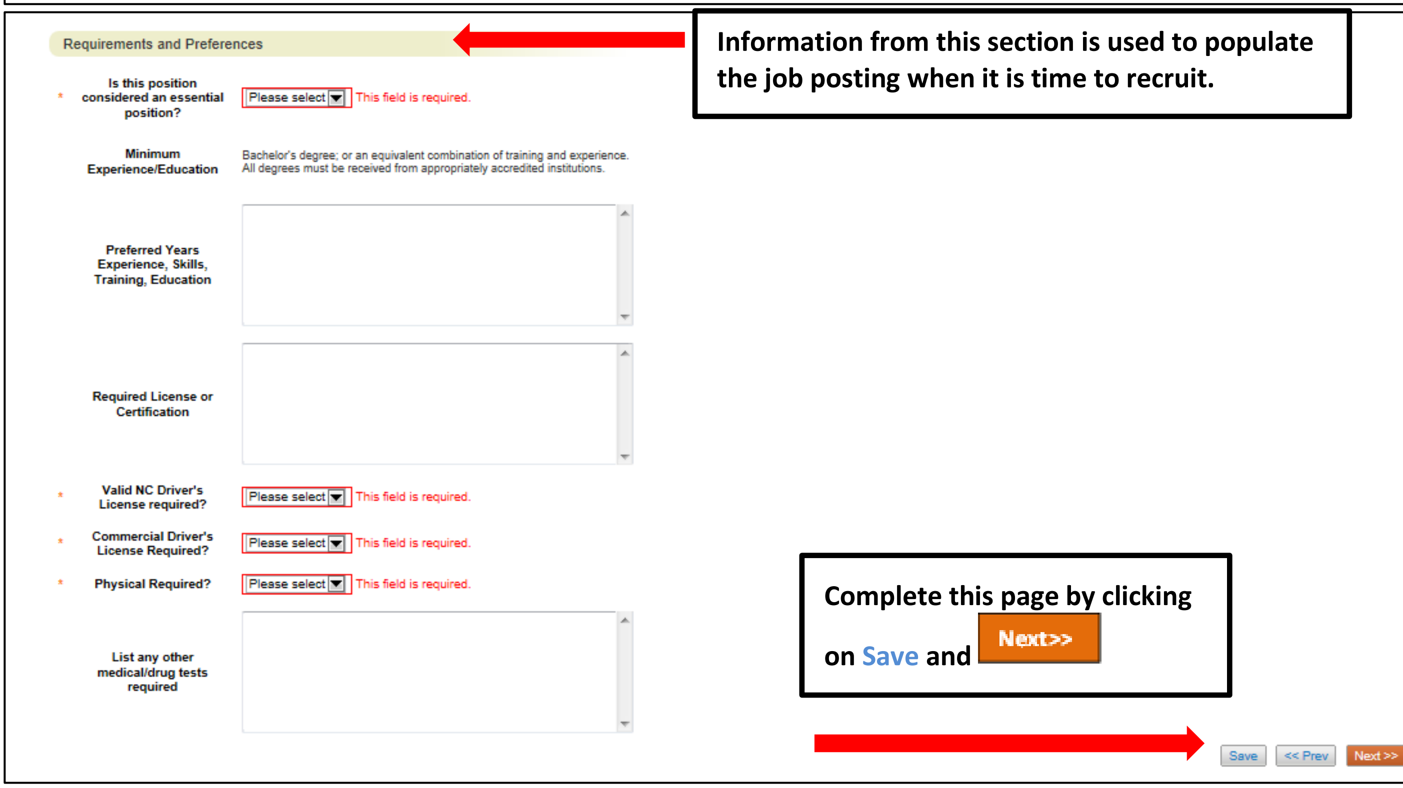
Clicking Add Primary Responsibilities and Duties Entry opens this section to enable entry of duties:



EHRA Modify – Position Details – Compliance and Requirements

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





EHRA Modify - Position Funding Information Tab

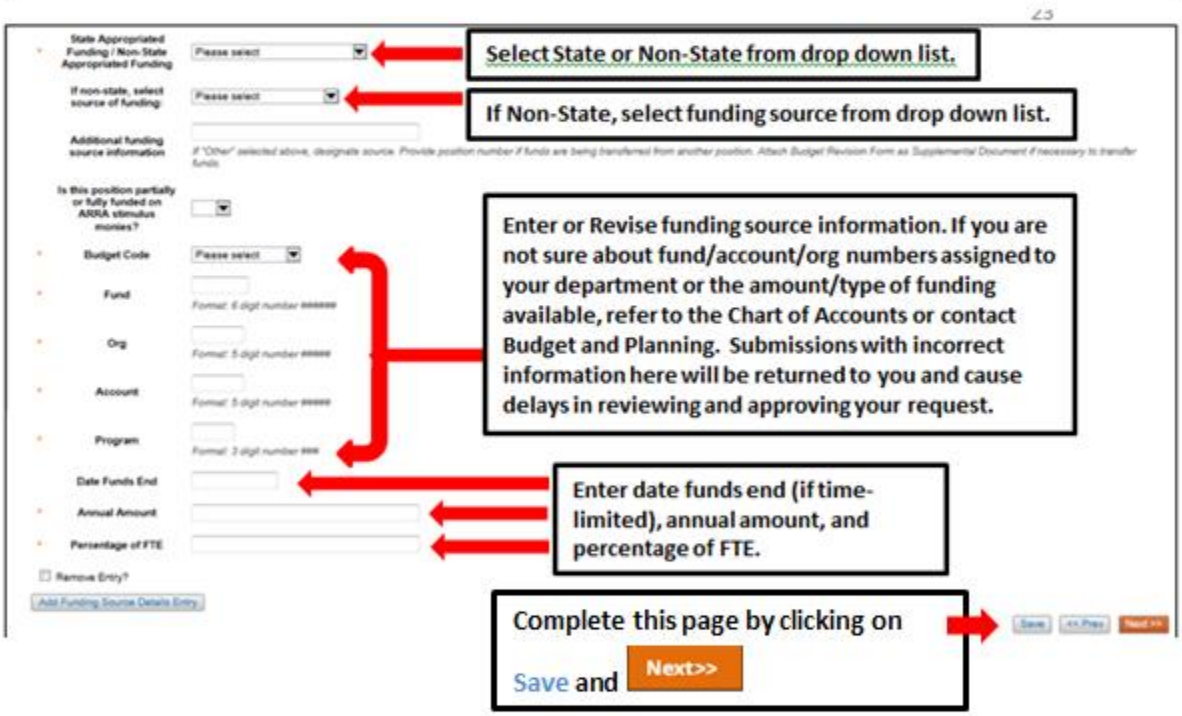
In the **Funding Source Details** section of this tab, you will confirm existing or enter new fund sources to support the request. If you are modifying a position to change the funding source, you will need to type over any existing fund, account, program and org codes to replace the numbers with new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



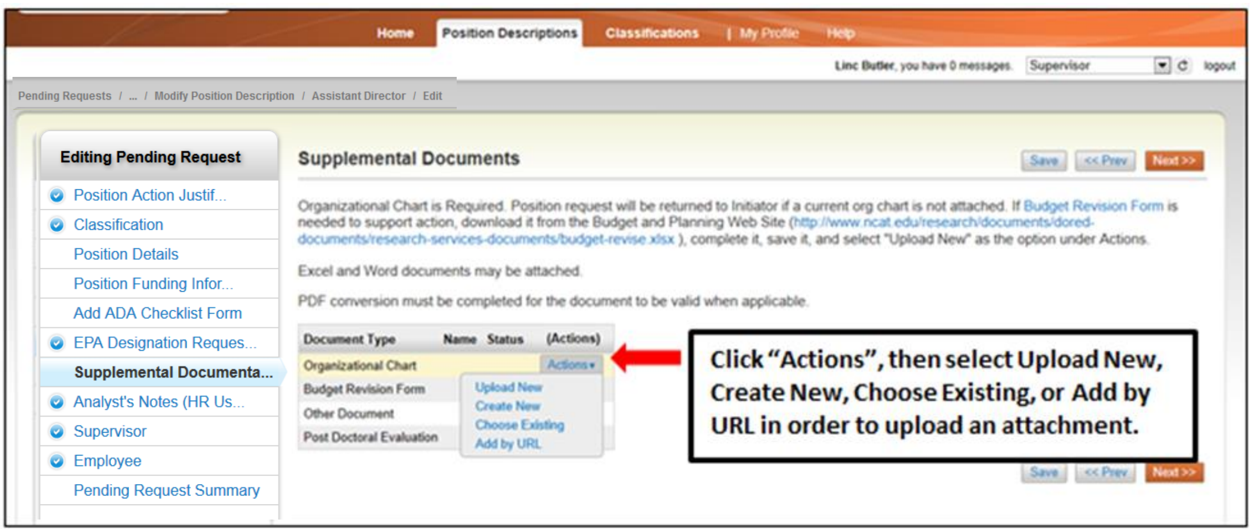
EHRA Modify - Supplemental Documents Tab

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 is 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.

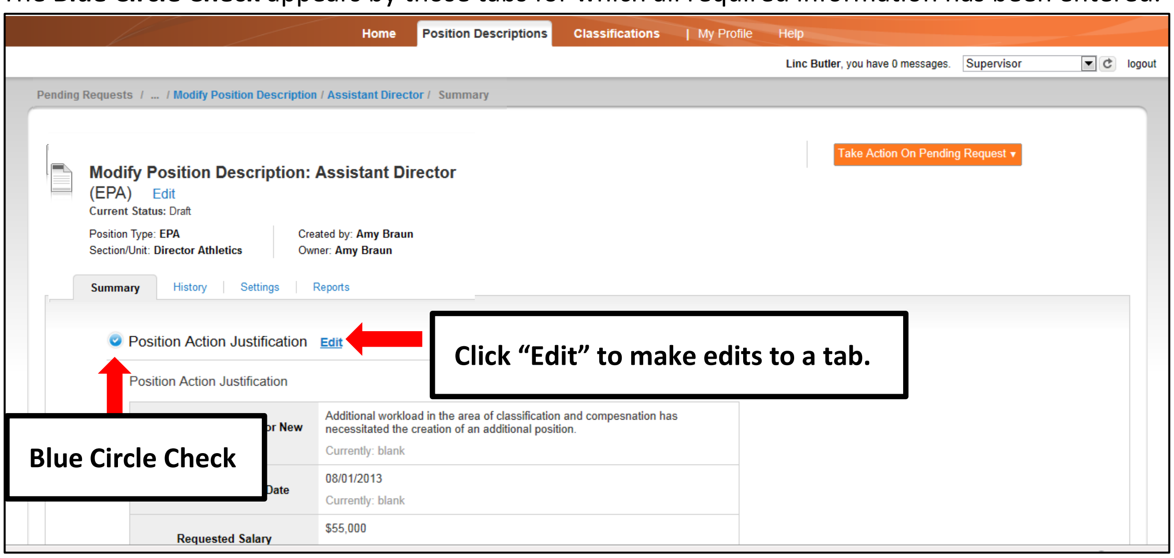
The **Organizational Chart** is required. Position requests will be returned to the Initiator if a current organizational chart is not attached. If a Budget Revision Form is needed to support the request, you can download it from the Budget Revision Form is needed to support the request, you can download 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:

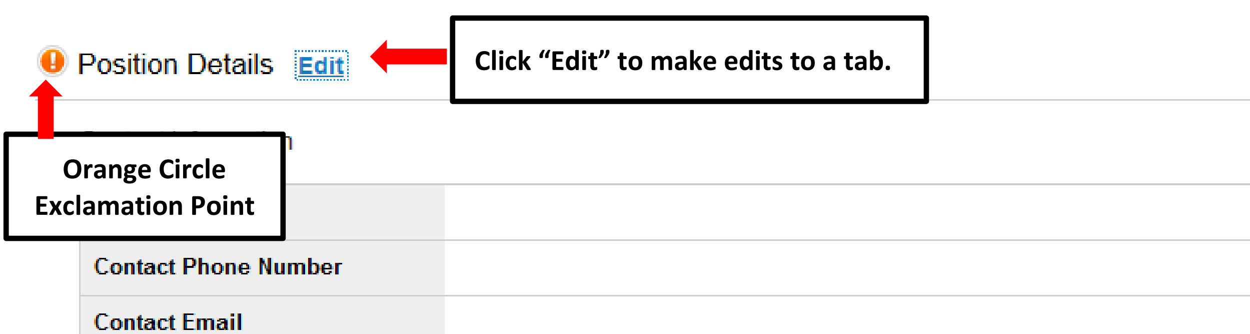


EHRA Modify - Pending Request Summary Tab

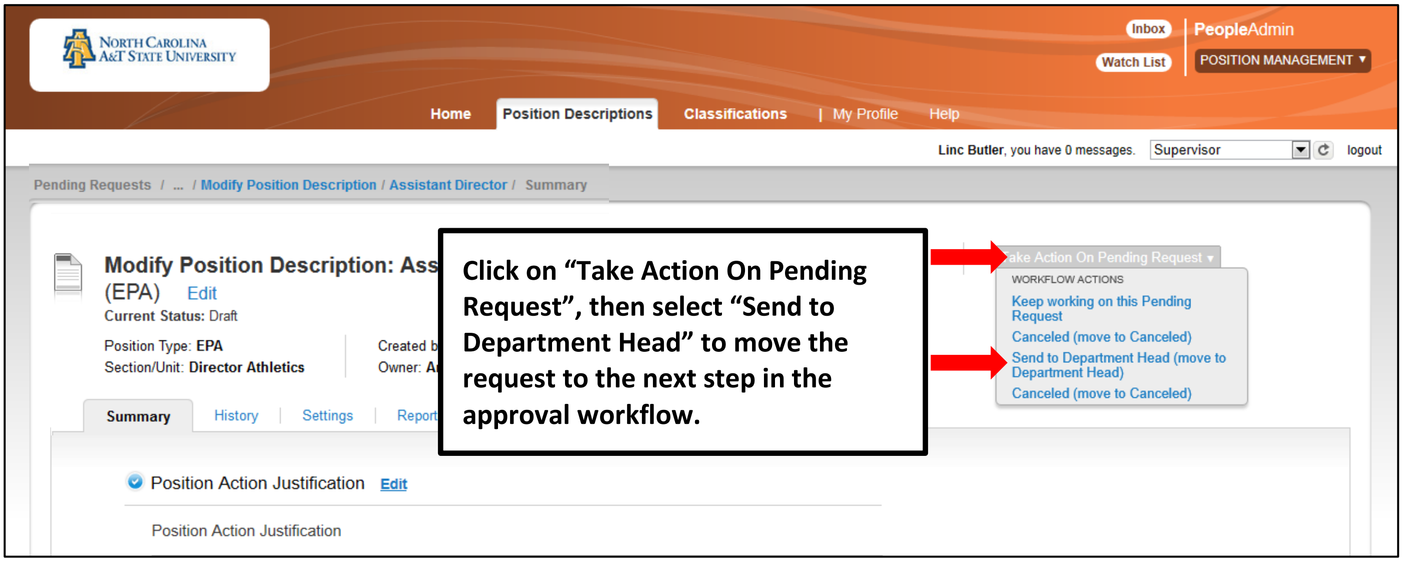
The **Pending Request Summary Tab** allows you to perform a final review all of the position information you've entered on the previous tabs prior to sending the request to the next step in the approval workflow.
Please review the details of the position summary carefully before continuing.
The **Blue Circle Check** appears by those tabs for which all required information has been entered:



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:



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: