

# PEOPLE ADMIN USER GUIDE



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# Section 1: System Basics

## System Basics - Accessing the PeopleAdmin Site and How to Log In

To access the PeopleAdmin 7 Recruitment and Position Management System, go to:

- <https://jobs.ncat.edu/hr>

Bookmarking the site will allow for quicker access to the log-in page. The login screen below will appear:

Enter your Username  
and Password here.



Click here to request  
a new account or a  
password reset.

Your username will be the part of your current NC A&T e-mail address that comes before “@ncat.edu.” For example, if your e-mail address is **jdsmith@ncat.edu**, then your PeopleAdmin username will be: **jdsmith**.

If this is your first time logging in to PeopleAdmin, your password will be the same as your username. Using the above example, the password upon initial log in would match the username and also be: **jdsmith**. Once you click the Login button, you will then be prompted to reset your password to one of your choosing. Your password must meet the following criteria:

- Minimum length is 7 characters
- Must contain at least 3 of the following:
  - A lowercase letter
  - An uppercase letter
  - A numerical digit (1, 2, 3, 4, etc.)
  - Special character (#, \$, %, &, etc.)

## Home Page Elements

The PeopleAdmin Home page received a refreshed layout on July 17, 2018 for a new cleaner look.

### What has changed?

#### New Layout

Things moved around a bit on the page, all are intuitive and easy to navigate. The most critical navigation change and less obvious is the Module Selector (switches between Applicant Tracking (now **"Hire"**) and Position Management (now **"Position"**)). **To change modules you will select the three blue menu dots in the upper left corner of your PeopleAdmin screen.**

The screenshot shows the PeopleAdmin Home page. At the top, there is a navigation bar with a "Hire" button and a "Position" button. A red arrow points to the three blue menu dots in the top left corner. Below the navigation bar, there is a "Welcome" message and a "My Profile" link. The main content area is divided into several sections: "Alerts" (1 alert from the administrator), "Inbox" (with a search bar and filters), "Watch List" (with a search bar and filters), "0 Active Applicants" (with a donut chart showing Evaluated and Unevaluated Applicants), "2 Committees Served By Department last 365 Days" (with a donut chart showing Office of Admissions - Director and Provost/V/C for Acad Aff), and "Average days your inbox tasks wait" (with a donut chart).

Select the three dots for the menu to change between the Applicant Tracking and Position Management modules

Home Postings Hiring Proposals Shortcuts

Welcome to your Online Recruitment and Position Management System

Alerts (1 alert from the administrator)

TYPE MESSAGE

IMPORTANT NOTICE - INITIATING RECRUITMENT: To post a position for recruitment you must have an approved position description in the Position Description Module. If you have not yet done so, please begin by: > Selecting "Position Management" (orange header) in the drop-down menu in the far upper right of your screen; > If this is an existing position select the "Positions Description" tab next to "Home" and the appropriate position type: SHRA or EHRA, and follow the instructions on the page for "modify an existing position"; > If this is a new position select the "Positions Description" tab next to "Home" and the appropriate position type: SHRA or EHRA, and follow the instructions on the page for "Create New" and follow the instructions provided on the page; > Post doctoral recruitment is initiated by contacting the Division of Research and Economic Development; > If you have questions or need assistance please refer to the user guide instructions found in the Links section on the right side of this page.

Inbox

SEARCH

Filters

TITLE	CURRENT STATE	DAYS IN CURRENT STATE
Assistant Dean/Associate Professor Dean's Office - Library Services	Closed	619
Dean of College of Science and Technology Provost/V/C for Acad Aff	Posted	307

Watch List

SEARCH

Unwatch Postings

0 Active Applicants

0

Evaluated Applicants  
Unevaluated Applicants

2 Committees Served By  
Department last 365 Days

Office of Admissions - Director  
Provost/V/C for Acad Aff

Average days your  
inbox tasks wait

#### New feature – Graphical Data

PeopleAdmin has added graphical reporting on your home page illustrating useful data based on your user type.

#### New Inbox

You will be able to see all of your action items, including those assigned to you as a search committee member (under the postings tab). You will also notice a few added fields to help you better find and prioritize your work, including the department and days in current workflow state. When you click on an action item in your inbox, you will be logged in automatically with the correct user group.

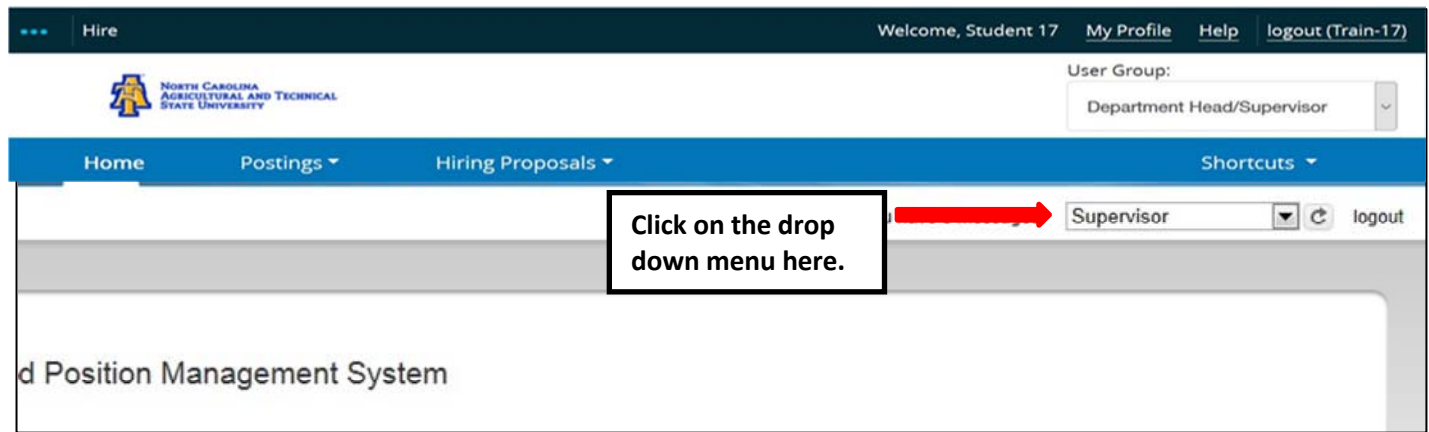
#### New Watchlist Functionality

The Watchlist is getting a refresh with Search and Filter functionality, and a more convenient bookmark icon on each Posting, Hiring Proposal, etc. You can click on this at any time to add it or remove it from your watch list.

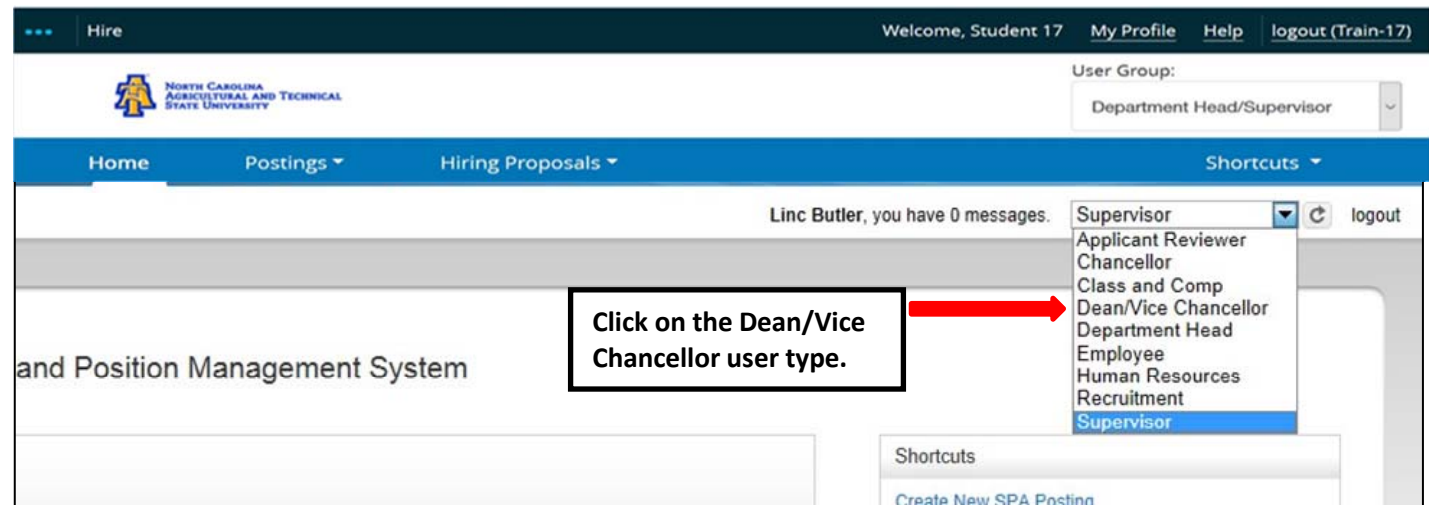
## System Basics - Switching Between User Types

*There are some users who will be assigned multiple user types depending on their role in the organization, and these users have the ability to easily switch between their assigned user types. An example of this is a Dean who wants to switch from the Supervisor user type, which only allows them to view the position descriptions for their direct reports, to the Dean / Vice Chancellor user type, which will allow them to view the position descriptions all of the positions in their school or college.*

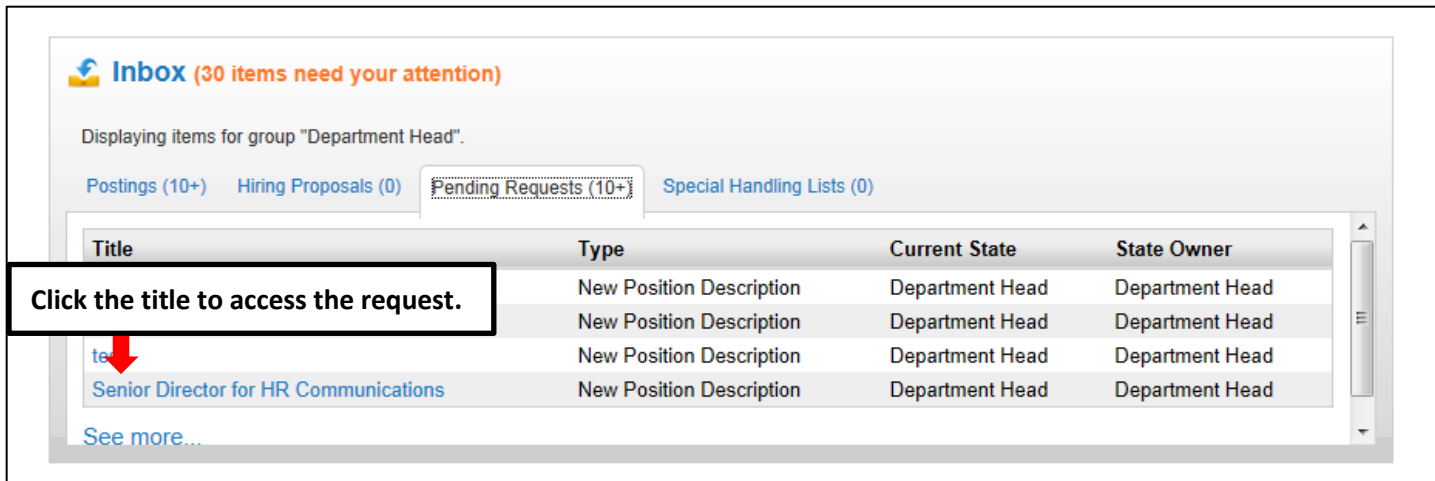
**You can switch between assigned user types at any time clicking on the drop down menu located on the top right corner of the page just above the grey bar:**



**Then select the user type you want to switch to by clicking on that user type.**



When a request appears in your **Inbox** under the **Pending Requests** tab, you can access the request by clicking on the **Title**:



**Inbox (30 items need your attention)**

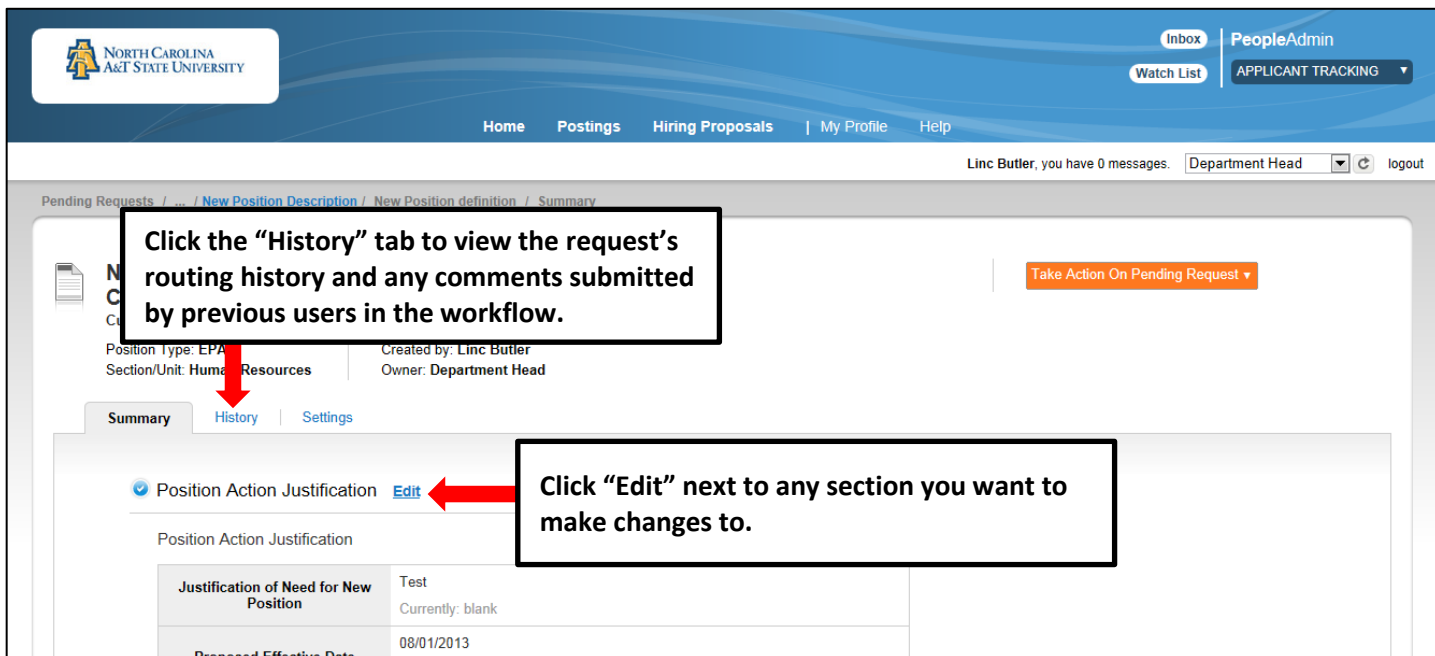
Displaying items for group "Department Head".

[Postings \(10+\)](#) [Hiring Proposals \(0\)](#) **[Pending Requests \(10+\)](#)** [Special Handling Lists \(0\)](#)

Title	Type	Current State	State Owner
<a href="#">New Position Description</a>	New Position Description	Department Head	Department Head
<a href="#">New Position Description</a>	New Position Description	Department Head	Department Head
<a href="#">New Position Description</a>	New Position Description	Department Head	Department Head
<a href="#">Senior Director for HR Communications</a>	New Position Description	Department Head	Department Head

[See more...](#)

You will then navigate to the **Position Action Summary** tab, from which you can review all information related to the request, including making any necessary changes by clicking **"Edit"** next to the section you want to make changes to, before approving the action and routing it to the next step in the approval workflow. You can also view the request's routing history and any comments submitted by previous users in the workflow by clicking on the **"History"** tab:



**North Carolina A&T State University**

**Inbox** | **PeopleAdmin**

[Watch List](#) | [APPLICANT TRACKING](#)

[Home](#) [Postings](#) [Hiring Proposals](#) | [My Profile](#) [Help](#)

Linc Butler, you have 0 messages. Department Head [logout](#)

Pending Requests / ... / [New Position Description](#) / [New Position definition](#) / [Summary](#)

**Click the "History" tab to view the request's routing history and any comments submitted by previous users in the workflow.**

**Take Action On Pending Request**

Position Type: EPA Created by: Linc Butler  
Section/Unit: Human Resources Owner: Department Head

[Summary](#) **[History](#)** [Settings](#)

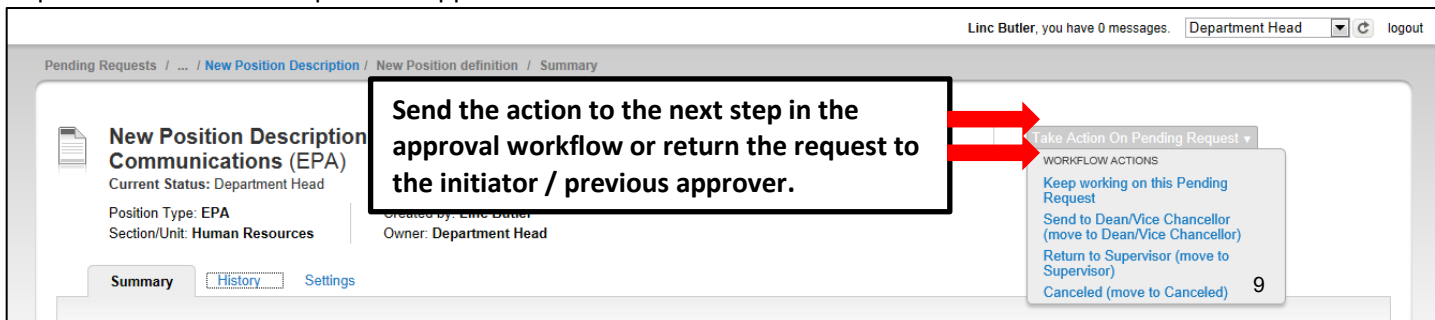
☒ Position Action Justification [Edit](#)

**Click "Edit" next to any section you want to make changes to.**

Position Action Justification

Justification of Need for New Position	Test Currently: blank
Proposed Effective Date	08/01/2013

Once the information in the request meets your approval, click the orange **"Take Action on Pending Request"** button in order to send the action to the next step in the approval workflow or to return the request to the initiator or previous approver:



Linc Butler, you have 0 messages. Department Head [logout](#)

Pending Requests / ... / [New Position Description](#) / [New Position definition](#) / [Summary](#)

**New Position Description Communications (EPA)**  
Current Status: Department Head  
Position Type: EPA  
Section/Unit: Human Resources  
Created by: Linc Butler  
Owner: Department Head

[Summary](#) [History](#) [Settings](#)

**Send the action to the next step in the approval workflow or return the request to the initiator / previous approver.**

**Take Action On Pending Request**

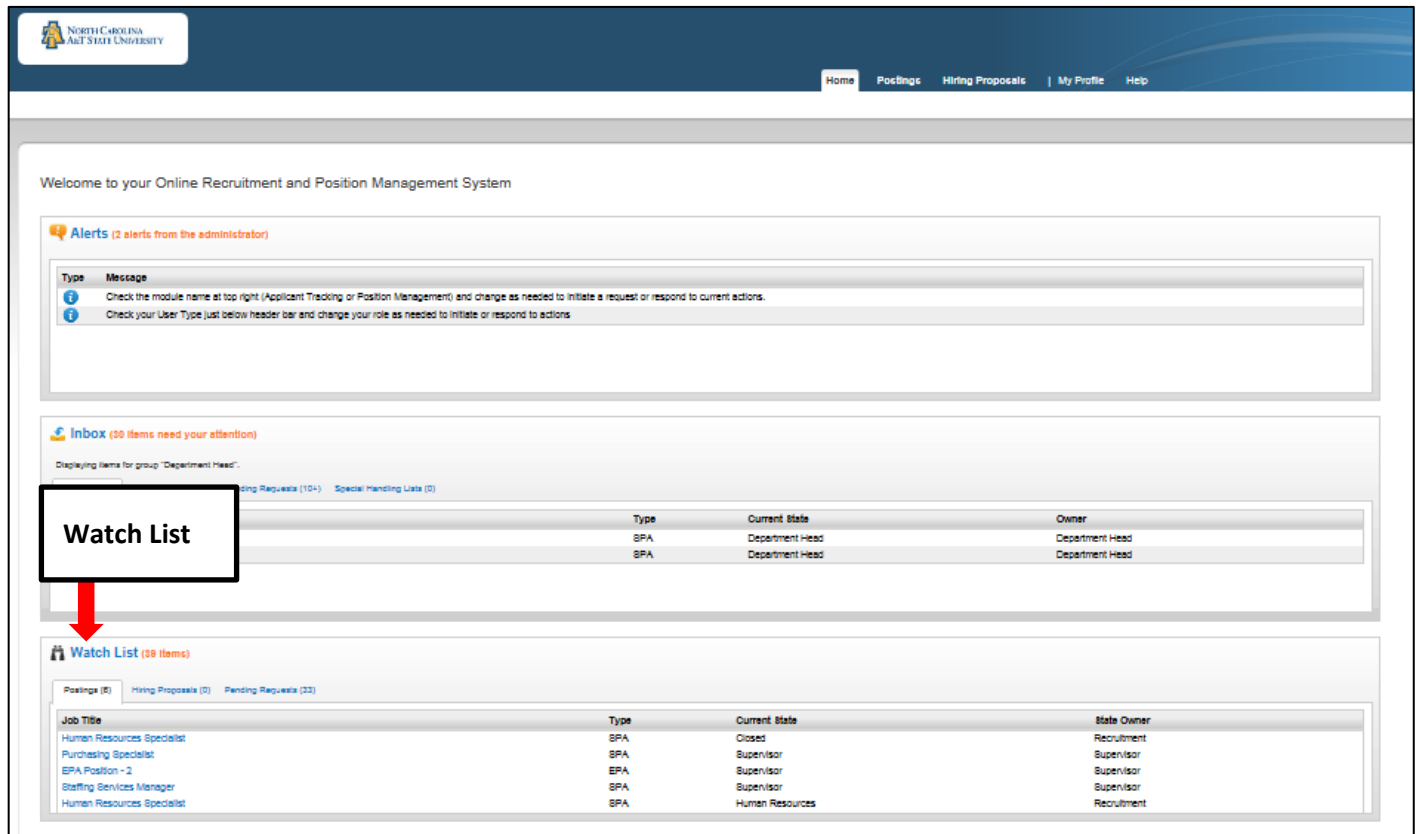
WORKFLOW ACTIONS

- [Keep working on this Pending Request](#)
- [Send to Dean/Vice Chancellor \(move to Dean/Vice Chancellor\)](#)
- [Return to Supervisor \(move to Supervisor\)](#)
- [Canceled \(move to Canceled\)](#)

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## System Basics - Using the Watch List

Your **Watch List** appears at the bottom of your **Home Page**, enabling you to easily monitor and track requests you've initiated once they have been routed to the next steps in the approval workflow:



North Carolina A&T State University

Home | Postings | Hiring Proposals | My Profile | Help

Welcome to your Online Recruitment and Position Management System

**Alerts** (2 alerts from the administrator)

Type	Message
Info	Check the module name at top right (Applicant Tracking or Position Management) and change as needed to initiate a request or respond to current actions.
Info	Check your User Type just below header bar and change your role as needed to initiate or respond to actions.

**Inbox** (50 items need your attention)

Displaying items for group "Department Head":

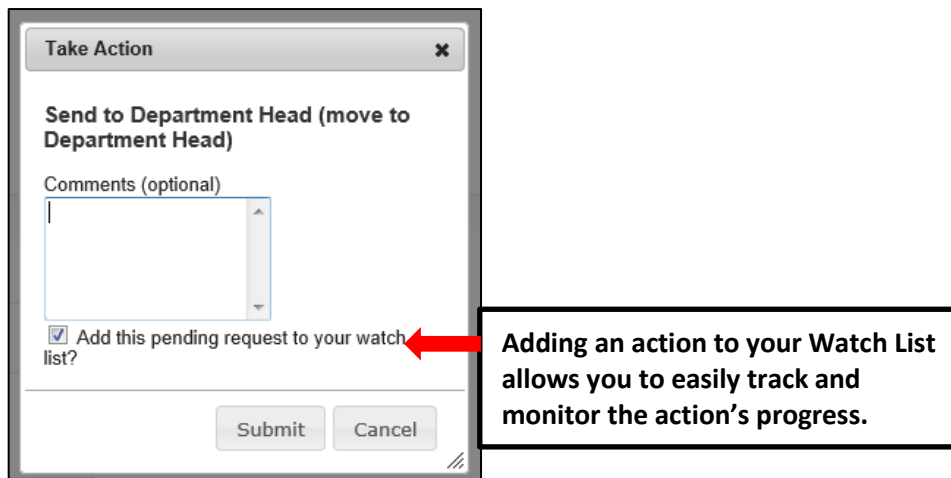
Type	Current State	Owner
SPA	Department Head	Department Head
SPA	Department Head	Department Head

**Watch List** (19 items)

Postings (8) | Hiring Proposals (0) | Pending Requests (11)

Job Title	Type	Current State	State Owner
Human Resources Specialist	SPA	Closed	Recruitment
Purchasing Specialist	SPA	Supervisor	Supervisor
EPA Position - 2	SPA	Supervisor	Supervisor
Staffing Services Manager	SPA	Supervisor	Supervisor
Human Resources Specialist	SPA	Human Resources	Recruitment

When routing an action to the next step in the approval workflow, you are given the option of adding the action to your Watch List prior to submitting on the **"Take Action"** box that appears:



**Take Action**

**Send to Department Head (move to Department Head)**

Comments (optional)

☒ Add this pending request to your watch list?

Submit Cancel

**Adding an action to your Watch List allows you to easily track and monitor the action's progress.**

Once an action is added to your Watch List, you can view requests by type by clicking on the tabs at the top: **Postings**, **Hiring Proposals**, and **Pending Requests**. You can also quickly view information about each request in the list:

- **Job Title:** Indicates the title of the position related to the request.
- **Type:** Indicates the type of request by position type (EHRA, SHRA, or Post Doctoral).
- **Current State:** Indicates what step of the approval workflow the request is in.
- **State Owner:** Indicates the user that needs to take action on the request.

Sort requests by type by clicking on the tab links.

Postings (6)

Hiring Proposals (0)

Pending Requests (33)

Job Title	Type	Current State	State Owner
Human Resources Specialist	SPA	Closed	Recruitment
Purchasing Specialist	SPA	Supervisor	Supervisor
EPA Position - 2	EPA	Supervisor	Supervisor
Staffing Services Manager	SPA	Supervisor	Supervisor
Human Resources Specialist	SPA	Human Resources	Recruitment

When a request appears in your **Watch List**, you can view the request by clicking on the **Job Title**. Unless the request is in a workflow state owned by you, you will not be able to take any action on the request:

Click the title to access the request.

Job Title	Type	Current State	State Owner
<a href="#">Human Resources Specialist</a>	SPA	Closed	Recruitment
<a href="#">Purchasing Specialist</a>	SPA	Supervisor	Supervisor
<a href="#">EPA Position - 2</a>	EPA	Supervisor	Supervisor
<a href="#">Staffing Services Manager</a>	SPA	Supervisor	Supervisor
<a href="#">Human Resources Specialist</a>	SPA	Human Resources	Recruitment

## System Basics - Shortcuts and My Links

The Shortcuts menu contains links for initiating requests such as creating a new posting and creating or modifying a position description.

The My Links menu contains links to information about the system, training tools, and the user guide.

Shortcuts

- Create New SPA Posting
- Create New EPA Posting
- Create New Post Doctoral Posting

My Links

Useful Links

- Training Videos  
(Go here for helpful videos for staff training on the use of PA7.)
- Your Applicant Portal  
(How Applicants access your PeopleAdmin system)
- PeopleAdmin MCPAC - Customer Portal Login  
(best practice library, customer support portal, customer community)



## Section 2: Position Management

The Position Management module provides online access to position description information, and allows for managers and supervisors to initiate position and salary increase requests for permanent SHRA, EHRA, and Post Doc positions. The specific requests that can be initiated in the Position Management module are:

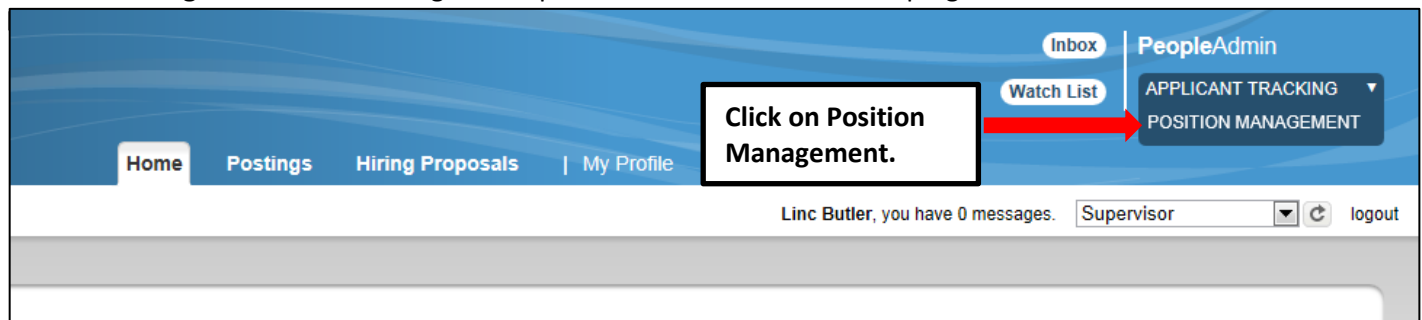
- Create New Position Description
- Modify Position Description

The only user types that can initiate a **Create New Position Description** or a **Modify Position Description** request are Supervisor, Department Head, and Dean/Vice Chancellor.

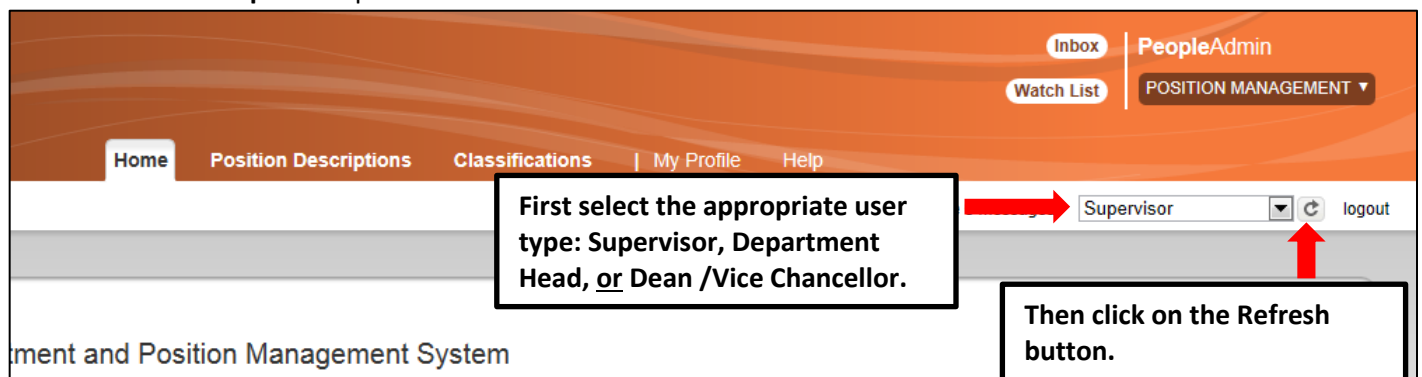
### Create New Position Description - SHRA

**IMPORTANT NOTE:** A budgeted available amount must be identified with a funding source **PRIOR TO** the initiation of a Create New Position Description request. Budgeted funds are subject to review and approval.

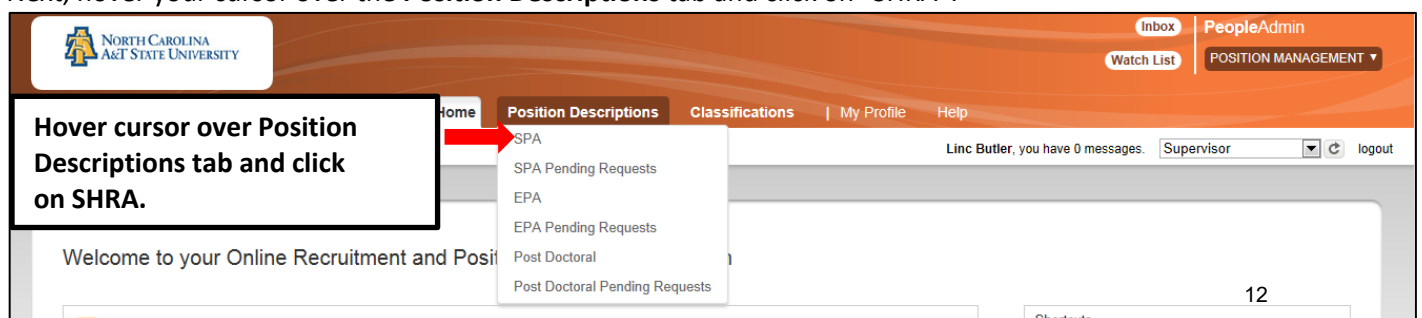
To initiate a **Create New Position Description** request for an SHRA position, first switch to the **Position Management** module using the drop down menu located in the top right corner of the



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 **Create New Position Description** request:



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





You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head	All positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	All positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

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.**

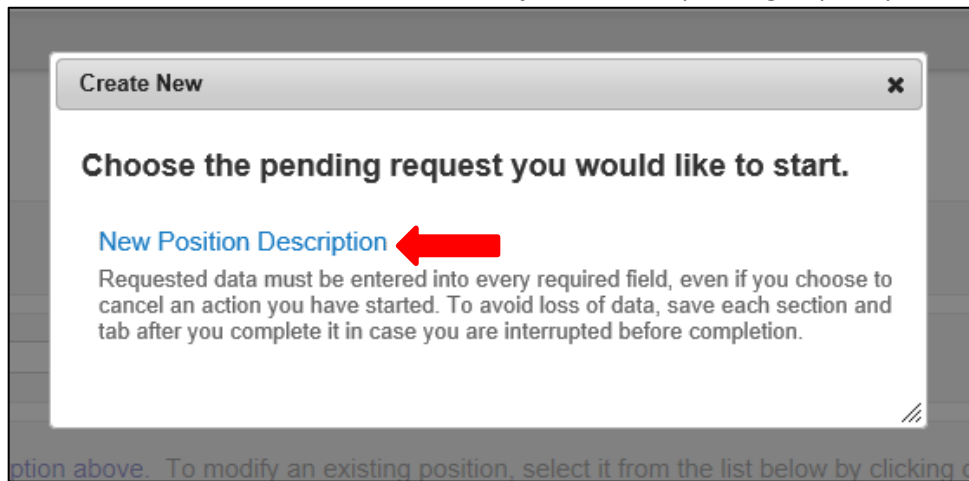
Working Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
<input type="checkbox"/> Staffing Services Manager	000016	Tammie	Hill	Human Resources Manager (Linc Butler)	Active	<a href="#">Actions</a>
<input type="checkbox"/> Administrative Support Spec	000016	Belinda	Macklin	Human Resources Manager (Linc Butler)	Active	<a href="#">Actions</a>
<input type="checkbox"/> Human Resources Specialist	010000	Ester	Jones	Human Resources Specialist (Amy Braun)	Active	<a href="#">Actions</a>
<input type="checkbox"/> Human Resources Manager	000027	Linc	Butler	Human Resources Manager (Linc Butler)	Active	<a href="#">Actions</a>
<input type="checkbox"/> Administrative Support Assoc	000037	Rozolene	Feimster	Business Officer (Jacob Teagle)	Active	<a href="#">Actions</a>
<input type="checkbox"/> Recruitment Coordinator	000040	Lonnie	Crotts	Human Resources Manager (Linc Butler)	Active	<a href="#">Actions</a>
<input type="checkbox"/> Administrative Support Spec	000045	Shelby	Clark-Fuller	Human Resources Specialist (Amy Braun)	Active	<a href="#">Actions</a>

To initiate the request, click on the orange **Create New Position Description** button located on the top right of the screen just below the grey bar:

**Click here to initiate the request.**

**Create New Position Description**

You will then click on **“New Position Description”** as the pending request you would like to start:



Enter the data fields for the **New Position Description** as follows; then click the orange **“Start Pending Request”** button located on the top right corner of the page:

## SHRA Create New - Edit Pending Request Page - General Navigation

After clicking on the “**Start Pending Request**” button, you will then be taken to the **Position Action Justification** tab, the first information tab that must be completed before the **Position Description** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the **Next>>** button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the “**Save**” button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields.

Tab list

Home Position Descriptions Classifications | My Profile Help

Linc Butler, you have 0 messages. Supervisor logout

Pending Requests / / New Position Description / / Edit

Editing Pending Request

Position Action Justif...

SPA Classification

SPA Position Details

Position Funding Infor...

Add ADA Checklist Form

Supplemental Documents

Supervisor

Pending Request Summary

Save and Next buttons.

Save Next >>

Check spelling

Required Information

Position Action Justification

Justification of Need for New Position

Proposed Effective Date

Requested Salary

Position Request Number

This field is required.

This field is required.

Required fields highlighted in RED.

Blue Check Circle

“Save” and “Next>>” buttons.

Save Next >>

## SHRA Create New - Saving to Return to a Pending Request Later

Also on the Editing Pending Request Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the “Save” button located in either the top or bottom right corner
- 2) Select “Pending Request Summary” from the Tab List (illustrated above)
- 3) Select “Keep Working on this Pending Request”

Home Position Descriptions Classifications | My Profile Help

Amy Braun, you have 0 messages. Supervisor logout

Pending Requests / ... / New Position Description / New Position definition / Summary

New Position Description: Administrative Support

Associate (SPA) Edit

Current Status: Draft

Position Type: SPA

Section/Unit: CLOE

Created by: Amy Braun

Owner: Amy Braun

Take Action On Pending Request

WORKFLOW ACTIONS

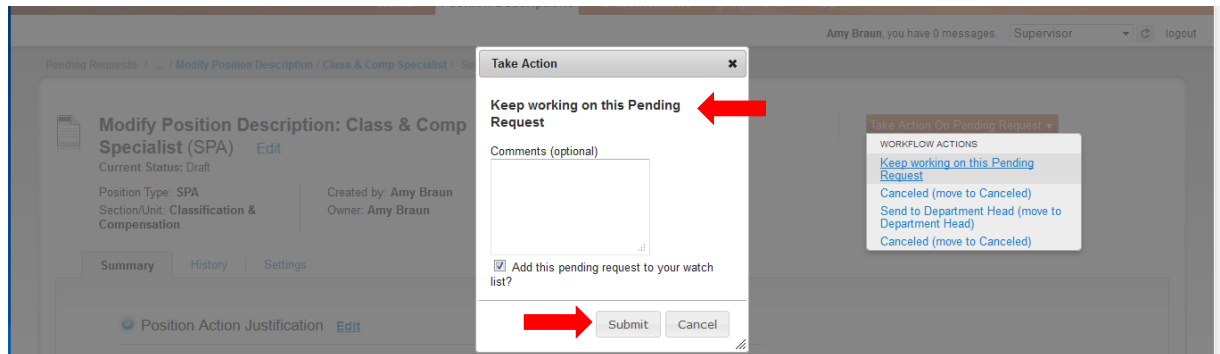
Keep working on this Pending Request

Canceled (move to Canceled)

Canceled (move to Canceled)

Summary History Settings

- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired
- 5) Click "Submit"



The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions** tab and click on "SHRA Pending Requests."

You will then return to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.

## SHRA Create New - Position Action Justification Tab

Follow the instructions at the top of the page then click the **Next>>** button to save changes and navigate to the next tab:

## SHRA Create New – Classification Tab

If you are not editing from an existing position, use "Filter these results" to search all position/classification (career band) titles by a key word. Your Class/Comp analyst in DHR can assist you in choosing a career band with related competencies most closely matching your business need.

To view a classification summary, click on the "Actions" link next to the classification title you want to view and select "View Classification". To return from the summary, use the Back button located on the top left corner of your web browser. To select a classification and proceed with creating the position description, click on the **Radio Button** to the left of the classification title you want to select, then and click on the button located on both the top and bottom right-hand corners of the page.

Clicking on the "Position/Classification Title" will open the "View Classification" page in a new tab within

our web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **SHRA Classification** tab and your request in progress. **PLEASE NOTE:** Clicking on the red “X” on the top right corner of your web browser will close the web browser and **log you out** of the system.

You can navigate to the previous tab by clicking on the grey “<<Prev” button located between the **Save** and **Next** buttons on the top right-hand corner of the page:

The screenshot shows the 'SPA Classification' page. The left sidebar has a radio button selected next to 'SPA Classification'. The top right has buttons for 'Save', '<< Prev', and 'Next >>'. A red arrow points to the '<< Prev' button with the text: 'Navigate to the previous tab by clicking on the “<<Prev” button.’

Below the sidebar, there is a section titled 'Classifications - Filter these results'. A red arrow points to the 'Filter these results' link with the text: 'Search all SHRA class titles by clicking on “Filter these results”’.

Below this is a table with columns: Position/Classification Title, Job Code, Classification Status, and (Actions). The first row is 'SPA Title - 1' with Job Code '23187' and Status 'Approved'. A red arrow points to the 'Actions' link in the first row with the text: 'View an SHRA classification summary by clicking on “Actions”.’

At the bottom left, a red arrow points to the 'Save' button with the text: 'Click the radio button next to the SHRA class title you want to select, then click “Save” and’.

## SHRA Create New – Position Details Tab

Follow the instructions at the top of the page, making sure to fill out all required fields highlighted in **RED**, and then click the **Save** button to save changes and navigate to the next tab:

The screenshot shows the 'SPA Position Details' page. The left sidebar has a radio button selected next to 'SPA Position Details'. The top right has buttons for 'Save', '<< Prev', and 'Next >>'. Below the sidebar, there is a section titled 'Contact Information' with fields for Contact Name, Contact Phone Number, Contact Email, Proxy (For Leave Reporting), Proxy Phone Number, and Proxy Email. Each field is highlighted in red and has a red arrow pointing to it with the text: 'This field is required.’

Below this is a section titled 'SPA Classification Information' with fields for Position/Classification Title, Job Code, and Requested Competency Level. The Requested Competency Level field is highlighted in red and has a red arrow pointing to it with the text: 'Select requested competency level from drop down list.’

At the bottom right, a red arrow points to the 'Save' button with the text: 'Who should be contacted if there are questions about the request?’.

At the bottom left, a red arrow points to the 'Save' button with the text: 'Who is the proxy for leave reporting approvals?’.

**Position Overview**

Primary Purpose of Position  This field is required.

Primary Function of Organizational Unit  This field is required.

**Position Information**

Working Position Title  This field is required.

Building and Room No.

Work Hours: From [time] to [time] on [days of week]  This field is required.

Hours per Week  This field is required.

Months per Year  Please select This field is required.

Appointment Type  Please select This field is required.

If Time Limited, Appointment Length   
If time limited, please indicate budget end date. If funded from more than one fund, indicate earliest end date. This field cannot be left blank if the "Time Limited" field above is checked selected.

**Detailed information in the Position Overview and Position Information sections assist the DHR Class & Comp Analyst in performing an**

**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.**

## SHRA Create New - Position Details Tab – Competencies and Related Job 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 SHRA position **at least three of the competencies** required by the career band profile must be used to structure the position description and link the duties being performed to the classification/career band's functional competency areas. If desired and relevant, all of the listed competencies may be used.

After identifying the first competency area from the "Competencies" list relevant to the job, click on the key button, **"Add Competencies and Related Job Duties Entry."** A pull-down list of all SHRA competencies will allow you to select one from the list related to this career band. Type in duties and examples of assigned work relevant to that competency, and assign an approximate percentage of all work time spent on those duties. Repeat these steps at least three times to capture the most important duties assigned to the position, those on which the employee will be evaluated. **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.

**Competencies from Classification**

Competency Profile [link to OSP] <http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/HR%20Specialist%20Profile.pdf>

**Use only the competencies listed here.**

**Competencies** Applied Knowledge – HR Program and Organization, Customer Service, Communication – Verbal/Written, Information/Records Administration, Program Administration, Managing Work and Performance

**Competencies and Related Job Duties**

To enter the job duties, please click the "Add Competencies and Related Job Duties Entry" button. Repeat for each competency. **scroll back down to this section** with each addition to enter a competency and add job duties. The total percentage of must equal 100%.

**Unless job duties are described in three competency areas, the system will prevent submission of this request.**

[Add Competencies and Related Job Duties Entry](#)

**Click here to add competencies and related job duties - 3 entries are required.**

18

**Competencies from Classification**

Competencies are knowledge, skills, and abilities that are required in the position to meet business needs. A specific group of competencies has been identified for each career band title. They must be demonstrated on the job and are utilized in the development of a position description.

**Using only those competencies listed below**, describe the major job duties of the position related to at least three of the competencies required in the selected career band.

**Competencies** Applied Knowledge – HR Program and Organization, Customer Service, Communication – Verbal/Written, Information/Records Administration, Program Administration, Managing Work and Performance

**Competency Profile** [link to OSP] <http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/HR%20Specialist%20Profile.pdf>

**Competencies and Related Job Duties**

To enter the job duties, please click the 'Add Competencies and Related Job Duties Entry' button. Repeat for each competency relevant to job functions. You will need to **scroll back down to this section** with each addition to enter a competency and add job duties. The total percentage of time allocated for all the tasks and responsibilities must equal 100%.

**Unless job duties are described in three competency areas, the system will prevent submission of this request.**

\* Competency  **Select competency from the drop down list.**

\* Describe the specific job duties related to this competency  **Describe specific job duties related to competency.**

\* Percentage Of Time  **Indicate percentage of time spent performing duties described.**

☐ Remove Entry?

[Add Competencies and Related Job Duties Entry](#)

## SHRA Create New – Position Details – Compliance and Requirements

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

**Supervisory**

\* Does this position supervise?  **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?  **Question is required to ensure NCAA compliance.**

**Requirements and Preferences**

\* Is this position considered an essential position?  **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?  **This field is required.**

\* Commercial Driver's License Required?  **This field is required.**

\* Physical Required?  **This field is required.**

**List any other medical/drug tests required**

**Complete this page by clicking on Save and** [Next>>](#)

[Save](#) [<< Prev](#) [Next >>](#)



## SHRA Create New - Position Funding Information Tab

In the Funding Source Details section of this tab, you will indicate the funding source(s) for this position. Click on the **Add Funding Source Details Entry** button to enter budget and other required codes. **Select "Save" after each entry.** PLEASE NOTE: The annual amount budgeted must equal the requested salary.

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) **FTVORG**- 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.

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. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **Next >>** to move to the next tab:

The screenshot shows the 'Position Funding Information' tab in the SHRA system. The left sidebar contains a list of options: Position Action Justif..., SPA Classification, SPA Position Details, Position Funding Inform... (highlighted), Add ADA Checklist Form, Supplemental Documents, Supervisor, and Pending Request Summary. The main content area is titled 'Position Funding Information' and includes a section for 'Funding Source Details'. A red arrow points from the 'Add Funding Source Details Entry' button to a text box that says '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.' Another red arrow points from the 'Save' button to a text box that says 'IMPORTANT NOTE: Remember to click "Save" after each funding source is entered.' Below the 'Funding Source Details' section, there are several fields for entering funding source information, including State or Non-State, Budget Code, Fund, Org, Account, Program, Date Funds End, Annual Amount, and Percentage of FTE. Red arrows point from these fields to text boxes providing instructions: 'Select State or Non-State from drop down list.', 'If Non-State, select funding source from drop down list.', '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.', and 'Enter date funds end (if time-limited), annual amount, and percentage of FTE.'

**IMPORTANT NOTE:** Remember to click "Save" after each funding source is entered.

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.

Select State or Non-State from drop down list.

If Non-State, select funding source from drop down list.

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.

Enter date funds end (if time-limited), annual amount, and percentage of FTE.



## SHRA Create New - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

e) Check each box that corresponds with the physical aspects of the essential functions of the position, then click “Next>>” to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)

**\* Required Information**

ADA Compliance Information

**The physical activity of this position (Check all that apply and at least one)**

- ☐ Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized. This factor is important if the amount and kind of climbing required exceeds that required for ordinary locomotion.
- ☐ Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. This factor is important if the amount and kind of balancing exceeds that needed for ordinary locomotion.
- ☐ Stopping: Bending body downward and forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
- ☐ Kneeling: Bending legs at knee to come to a rest on knee or knees.
- ☐ Crouching: Bending the body downward and forward by bending leg and spine.
- ☐ Crawling: Moving about on hands and feet.
- ☐ Reaching: Extending hand(s) and arm(s) in any direction.
- ☐ Standing: Particularly for sustained periods of time.
- ☐ Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another.
- ☐ Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.
- ☐ Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
- ☐ Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. This factor is important if it occurs to a considerable degree and requires the substantial use of the upper extremities and back muscles.
- ☐ Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.
- ☐ Grasping: Applying pressure to an object with the fingers and palm.
- ☐ Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of finger tips.
- ☐ Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
- ☐ Hearing: Perceiving the nature of sounds at normal speaking levels with or without correction. Ability to receive detailed information through oral communication, and to make fine discrimination in sound.
- ☐ Repetitive motions: Substantial movements (motions) of the wrists, hands, and/or fingers.

**The physical requirements of this position (Select One)**

Please select  This field is required.

**Select one from the drop down list.**

**The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)**

- ☐ The worker is required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; extensive reading; visual inspection involving small defects, small parts, and/or op.
- ☐ The worker is required to have visual acuity to perform an activity such as: operates machines such as lathes, drill presses, power saws and mills where the seeing job is at or within arm's reach; performs mechanical or skilled trades tasks of a non-re.
- ☐ The worker is required to have visual acuity to operate motor vehicles or heavy equipment.
- ☐ The worker is required to have visual acuity to determine the accuracy, neatness, and thoroughness of the work assigned (i.e., custodial, food services, general laborer, etc.) or to make general observations of facilities or structures.

**The condition the worker will be subject to in this position (Check all that apply and at least one)**

- ☐ The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes.
- ☐ The worker is subject to outside environmental conditions: No effective protection from the weather.
- ☐ The worker is subject to both environmental conditions: Activities occur inside and outside.
- ☐ The worker is subject to extreme cold: Temperatures typically below 32 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.
- ☐ The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.
- ☐ The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the ambient noise level.
- ☐ The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.
- ☐ The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, exposure to high heat or exposure to chemicals.
- ☐ The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system of the skin: Fumes, odors, dusts, mists, gases or poor ventilation.
- ☐ The worker is subject to oils: There is air and/or skin exposure to oils and other cutting fluids.
- ☐ The worker is required to wear respirator.
- ☐ The worker frequently is in close quarters, crawl space, shafts, man holes, small enclosed rooms, small sewage and water line pipes, and other areas which could cause claustrophobia.
- ☐ The worker is required to function in narrow aisles or passage ways.
- ☐ The worker is exposed to infectious diseases.
- ☐ The worker is required to function around prisoners or mental patients.
- ☐ None: The worker is not substantially exposed to adverse environmental conditions (such as in typical office or administrative work).

**Check all that apply and at least one in this section.**

**Check all that apply and at least one in this section.**

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

Save << Prev Next >>

## SHRA Create New - 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](http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx) 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:

Click "Actions", then select Upload New, Create New, Choose Existing, or Add by URL in order to upload an attachment.

Complete this page by clicking on Save and Next >>

## SHRA Create New - Supervisor Tab

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word.

Navigate to the previous tab by clicking on the "<<Prev" button.

Search all position descriptions by clicking on "Filter these results".

Click the radio button next to the position description you want to select, then click Next >>

Working Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
<input type="radio"/> Staffing Services Manager	000016	Tammie	Hill	Human Resources Manager (Linc Butler)	Active	Actions
<input type="radio"/> Administrative Support Spec	000018	Belinda	Macklin	Human Resources Manager (Linc Butler)	Active	Actions
<input type="radio"/> Human Resources Specialist	010000	Ester	Jones	Human Resources Specialist (Amy Braun)	Active	Actions
<input type="radio"/> Human Resources Manager	000027	Linc	Butler		Active	Actions
<input type="radio"/> Administrative Support Assoc	000037	Rozolene	Feimster	Business Officer (Jacob Teagle)	Active	Actions

To view one of the position descriptions in the list, click on the **“Actions”** link next to the classification title you want to view and select **“View”**, or click on the **Working Position Title**. To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click the **Next>>** button.

**PLEASE NOTE:** The selection list of supervisors is dependent on the **POSITION TYPE (SHRA or EHRA)** being created. To select a supervisor in a different Position Type (for example EHRA supervising SHRA), click on **“Filter these results”** and select the Position Type to which the supervisor of the position belongs. Then click on

**REMEMBER:** The positions that appear in this list are also based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor) and the organizational unit to which you are assigned.

## SHRA Create New - 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:

SPA Position Details [Edit](#)

Contact Information

Name	
Phone Number	
Contact Email	
Proxy (For Leave Reporting)	
Proxy Phone Number	

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)”**:

North Carolina A&T STATE UNIVERSITY

Home Position Descriptions Classifications My Profile Help

Pending Requests / ... / New Position Description / New Position definition / Summary

New Position Description: Unnamed Description (SPA) [Edit](#)

Current Status: Draft

Position Type: SPA

Section/Unit: Compensation, Benefits & Position Management

Create Owner

Summary History Settings

Position Action Justification [Edit](#)

Position Action Justification

Take Action On Pending Request

WORKFLOW ACTIONS

- Keep working on this Pending Request
- Canceled (move to Canceled)
- Send to Department Head (move to Department Head)
- Canceled (move to Canceled)

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:

Take Action

Send to Department Head (move to Department Head)

Comments (optional)

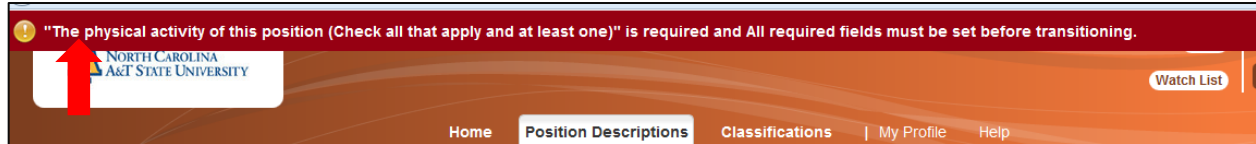
☒ Add this pending request to your watch list?

Submit Cancel

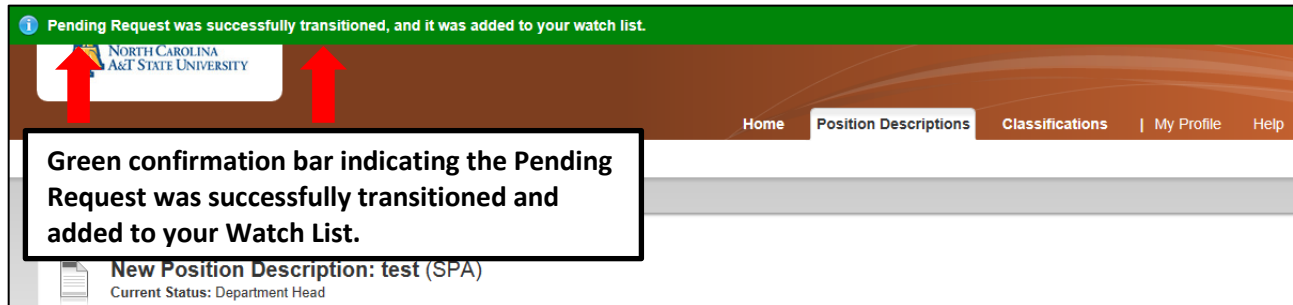
Comments are optional and can be viewed by the next level approver in the History tab.

Adding the action to your Watch List allows you to easily track and monitor the action’s progress.

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation.



Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

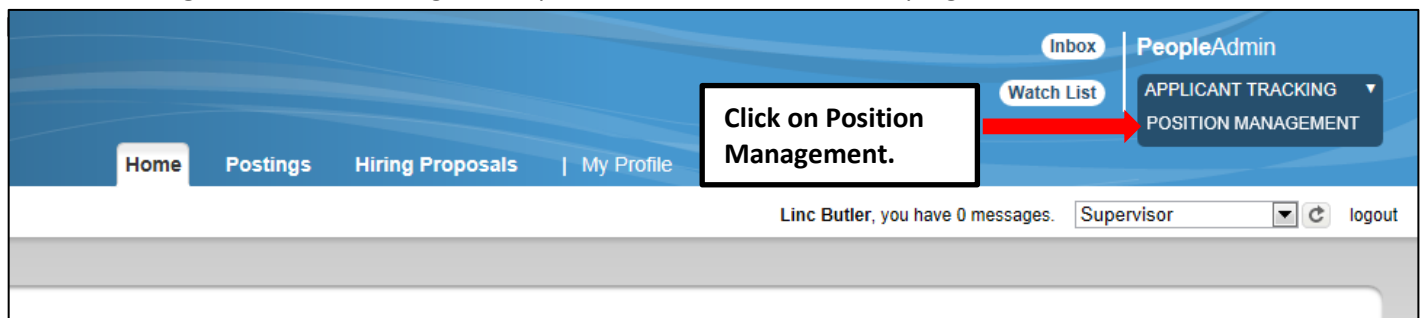


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## [Create New Position Description - EHRA](#)

**IMPORTANT NOTE:** A budgeted available amount must be identified with a funding source **PRIOR TO** the initiation of a Create New Position Description request. Budgeted funds are subject to review and approval.

To initiate a **Create New 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 **Create New Position Description** request:

The screenshot shows the top navigation bar of the PeopleAdmin system. The 'POSITION MANAGEMENT' dropdown menu is open, and the 'Supervisor' user type is selected. A red arrow points to the 'Supervisor' dropdown, and another red arrow points to the 'Refresh' button (a circular arrow icon) next to it. A text box with a red arrow pointing to the dropdown says: "First select the appropriate user type: Supervisor, Department Head, or Dean /Vice Chancellor." Another text box with a red arrow pointing to the refresh button says: "Then click on the Refresh button."

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

The screenshot shows the 'Position Descriptions' tab selected in the navigation bar. A dropdown menu is open, showing options: SPA, SPA Pending Requests, EPA, EPA Pending Requests, Post Doctoral, and Post Doctoral Pending Requests. A red arrow points to the 'EPA' option. A text box with a red arrow pointing to the 'Position Descriptions' tab says: "Hover cursor over Position Descriptions tab and click on EHRA."

You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head	All positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	All positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

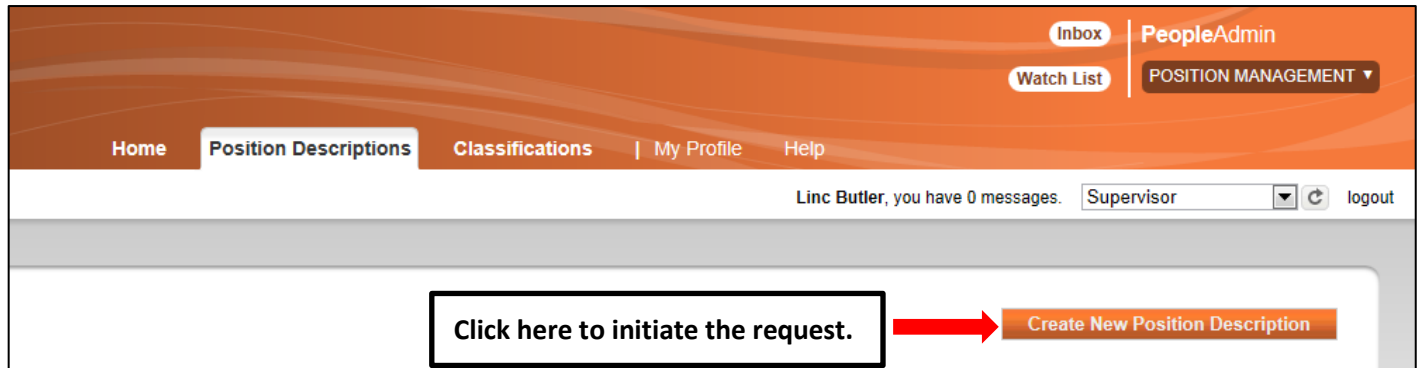
In the **Position Descriptions** view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches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

The screenshot shows the 'Position Descriptions' view for the 'EPA' user type. The 'Supervisor' user type is selected in the dropdown. A text box with a red arrow pointing to the dropdown says: "Active user type is Supervisor." A text box with a red arrow pointing to the search bar says: "List of position descriptions by active user type." A text box with a red arrow pointing to the search bar says: "Searches are customizable by position attributes and can be saved for later use." The search bar contains the text "Search: "Position Descriptions" (6 Items Found)". Below the search bar is a table of results.

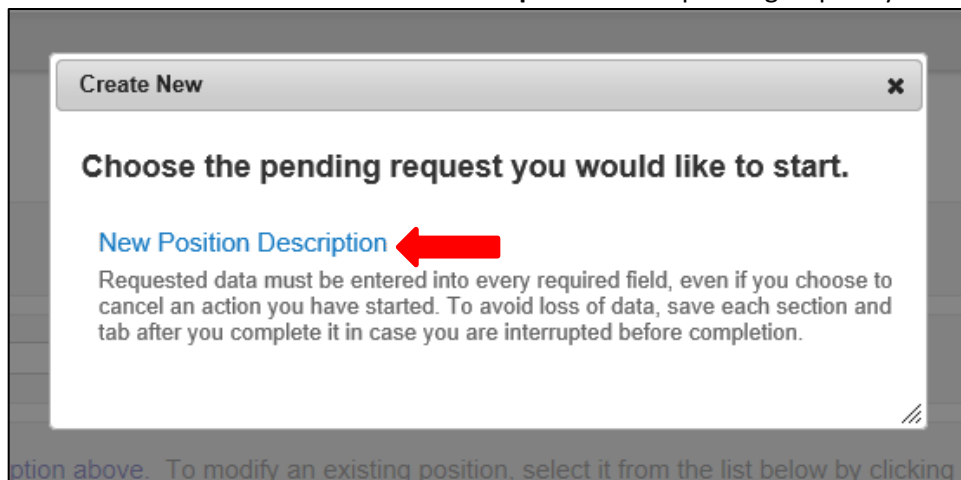
Working Position Title	Position Number	Department	Position/Classification Title	(Actions)
EPA Position - 2	76767	Intercollegiate Athletics	Assoc Director of Athletics	Actions▼
DHR EPA Position Test 1	12345	Student Affairs	Admissions Officer	Actions▼
Director		Compensation, Benefits & Position Management	Director	Actions▼
Assistant VC for HR		Human Resources	Asst VC-Human Resources	Actions▼



To initiate the request, click on the orange **“Create New Position Description”** button located on the top right of the screen just below the grey bar:



You will then click on **“New Position Description”** as the pending request you would like to start:



Enter the data fields for the **New Position Description** as follows then click the orange **“Start Pending Request”** button located on the top right corner of the page:

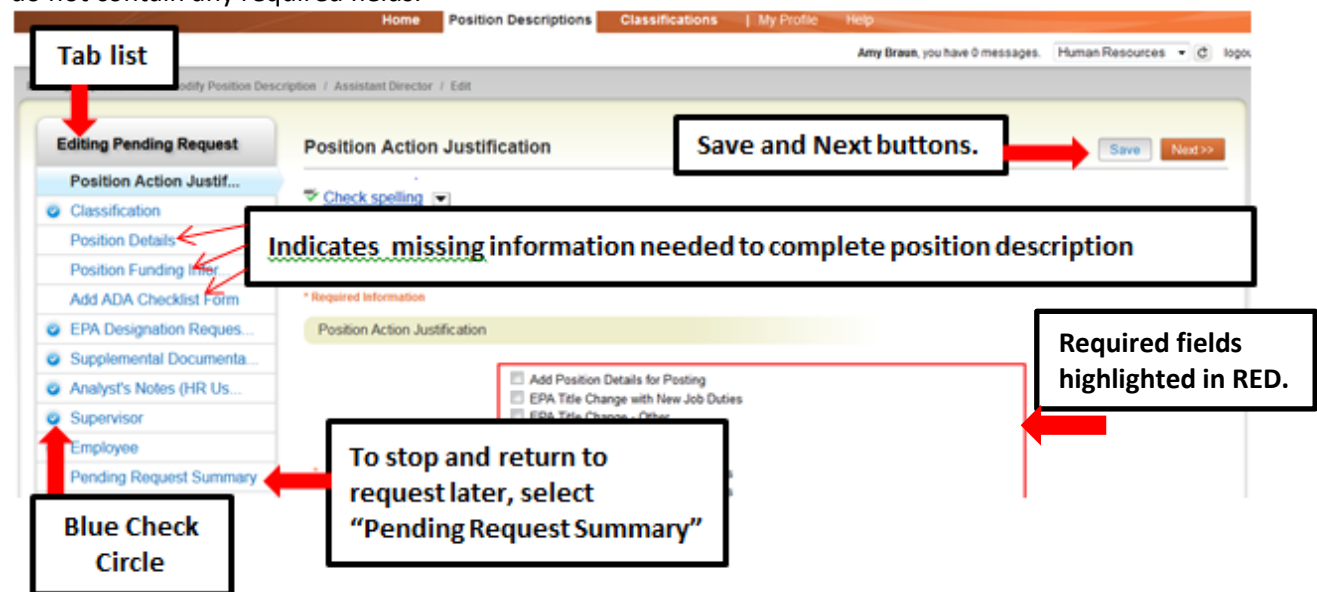
A screenshot of the 'New Position Description' form in the PeopleAdmin application. The form is titled 'New Position Description' and includes fields for 'Working Position Title', 'Organizational Unit', 'Department', and 'Section/Unit'. A red arrow points from a text box '1. Enter the Working Title of the position.' to the 'Working Position Title' field. Another red arrow points from a text box '2. Select the department to which the position is assigned from the drop down list.' to the 'Department' dropdown menu. A third red arrow points from a text box '3. Select the Section/Unit to which the position is assigned from the drop down list.' to the 'Section/Unit' dropdown menu. A fourth red arrow points from a text box '4. Once all data fields are filled in, click Start Pending Request.' to the 'Start Pending Request' button. The button is orange and located in the top right corner of the form area. A 'Cancel' button is also visible next to it. At the bottom of the form, there is a checkbox labeled 'Clone an existing Position Description?'.

## [EHRA Create New - Edit Pending Request Page - General Navigation](#)

After clicking on the “**Start Pending Request**” button, you will then be taken into the **Position Action Justification tab**, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the **Next>>** button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the “**Save**” button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The Blue Check Circle also appears next to tabs that do not contain any required fields.

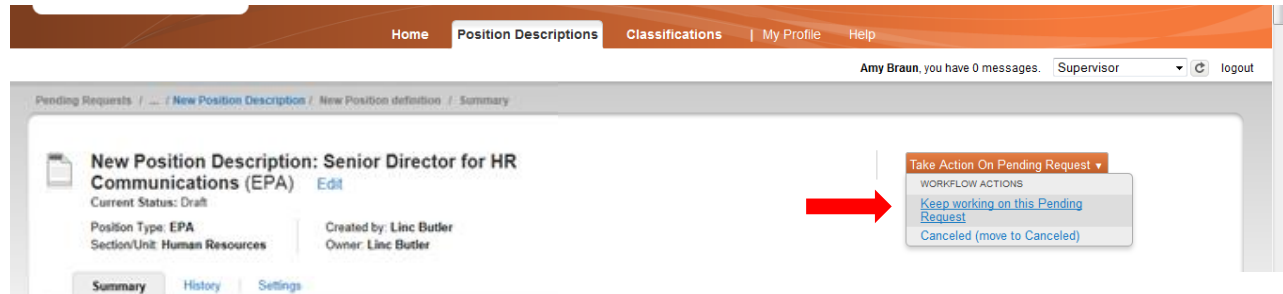




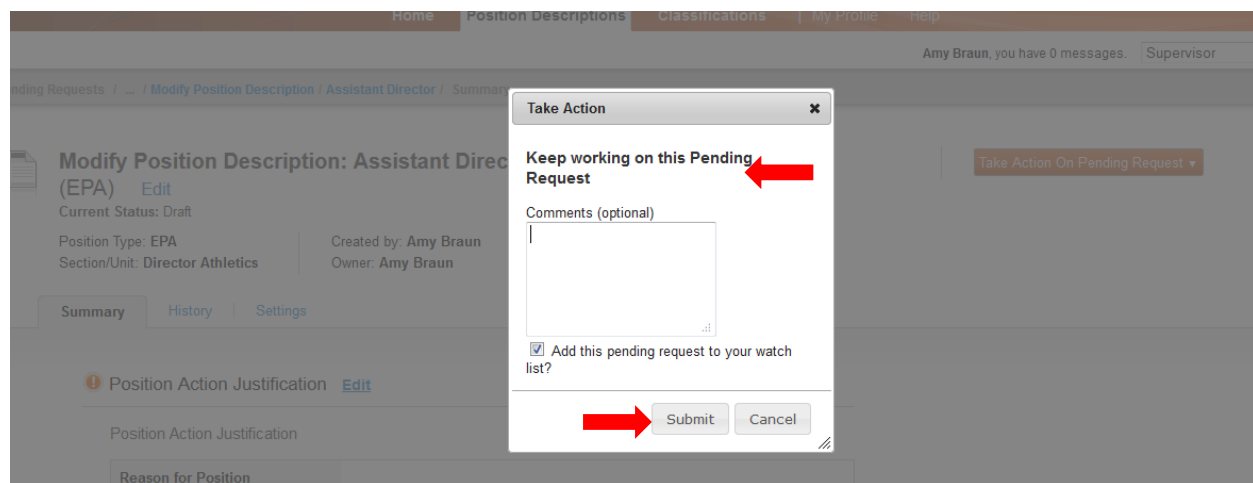
## **EHRA Create New - Saving to Return to a Pending Request Later**

Also on the **Editing Pending Request** Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following these steps will ensure that all your work is saved when you open the request for completion.

- 1) Click the “Save” button located in either the top or bottom right corner
- 2) Select “**Pending Request Summary**” from the Tab List (illustrated above)
- 3) Select “**Keep Working on this Pending Request**”

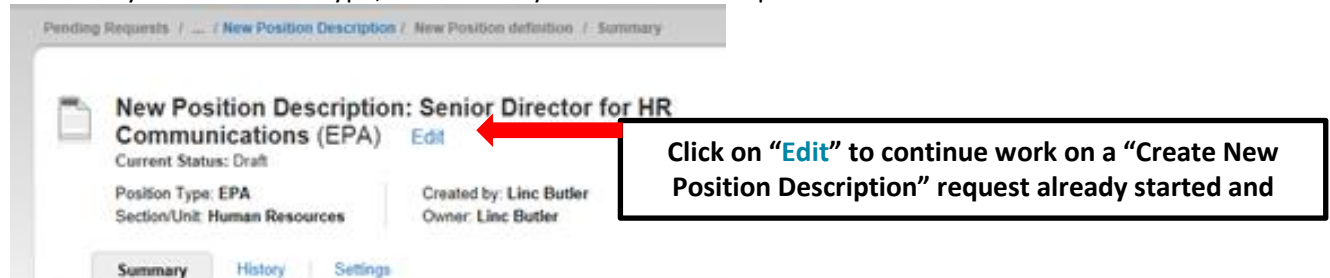


- 4) Add any **Comments** into the window that opens (illustrated below) as notes to yourself, if desired
- 5) Click “**Submit**”




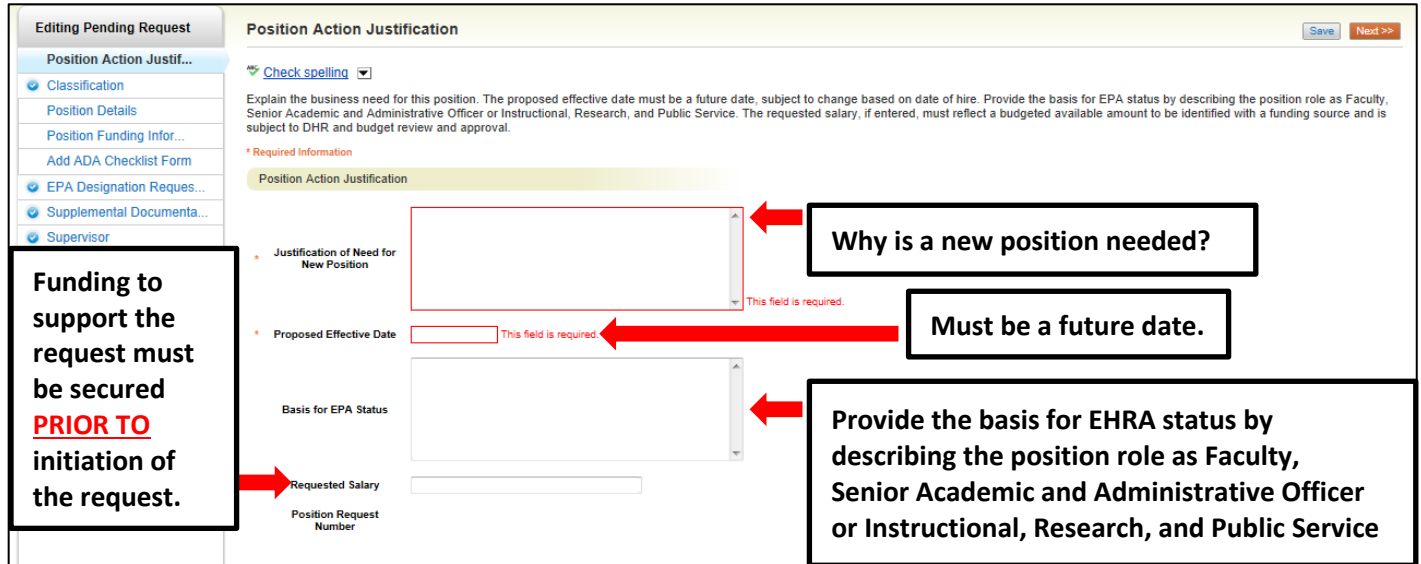
The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions** tab and click on “**EHRA Pending Requests.**”

You will then return to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.



## [EHRA Create New - Position Action Justification Tab](#)

Follow the instructions at the top of the page then click the  button to save changes and navigate to the next tab:




The screenshot shows the "Position Action Justification" tab in the EHRA system. The left sidebar contains a menu with options: Classification, Position Details, Position Funding Information, Add ADA Checklist Form, EPA Designation Request, Supplemental Documentation, and Supervisor. The main content area has a "Check spelling" button and a text area for justification. Below this are fields for "Justification of Need for New Position", "Proposed Effective Date", "Basis for EPA Status", "Requested Salary", and "Position Request Number". Annotations with red arrows point to specific fields:

- A box on the left states: "Funding to support the request must be secured **PRIOR TO** initiation of the request." with an arrow pointing to the "Requested Salary" field.
- A box on the right asks: "Why is a new position needed?" with an arrow pointing to the "Justification of Need for New Position" text area.
- A box on the right states: "Must be a future date." with an arrow pointing to the "Proposed Effective Date" field, which has a red "This field is required" message below it.
- A box on the right states: "Provide the basis for EHRA status by describing the position role as Faculty, Senior Academic and Administrative Officer or Instructional, Research, and Public Service" with an arrow pointing to the "Basis for EPA Status" text area.

## [EHRA Create New - Classification Tab](#)

If you are not editing from an existing position, use **"Filter these results"** to search all EHRA titles by a key word.

To view a classification summary, click on the "Actions" link next to the classification title you want to view and select **"View Classification."** To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a classification and proceed with creating the position description, click on the **Radio Button** to the left of the classification title you want to select, then and click **"Save"** or the  button located on both the top and bottom right-hand corners of the page. The Position/Classification title selected here may be a more general title than the position Working Title.

Clicking on the **Position/Classification Title** will open the **View Classification** page in a new tab within your web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **Classification** tab and your request in progress. **PLEASE NOTE:** Clicking on the red "X" on the top right corner of your web browser will close the web browser and log you out of the system. You can navigate to the previous tab by clicking on the **"<<Prev"** button located between the Save and Next buttons on the top right-hand corner of the page:

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

Pending Requests / ... / New Position Description / Senior Director for HR Communications / Edit

**Editing Pending Request**  
Position Action Justif...  
**Classification**  
Position Details  
Position Funding Infor...  
Add ADA Checklist Form  
EPA Designation Reques...  
Supplemental Documenta...

**Classification**

If you are not editing from an existing position, use "Filter these results" to search all EPA titles by a key word. Click the selection button to the left of any Job Title and then SAVE to select it. The Position/Classification title selected here may be a more general title than the position Working Title. After selecting and saving a Position/Classification title, proceed by clicking the orange Next>> button.

If in the process of viewing or changing a job/classification title you open the Classifications tab, you have opened a new window within the system and need to close the Classifications tab after reviewing the information. Closing this tab will return you to the Position Descriptions tab and your request in progress.

Classifications - Filter these results

Saved Search: "Classifications" (288)

← Previous 1 2 3 4 5 6 7 8 9 10 Next →

Position/Classification	Job Code	EPA Position Type	EPA E-class	(Actions)
<input type="radio"/> Test EPA Class	Test	Tier I	Test	Actions
<input type="radio"/> EPA Title-1	244641	Tier I	test	Actions
<input type="radio"/> New Title	0	TBD	TBD	Actions
<input type="radio"/> 4-H Program Assistant	80219	EPANFac	EN	Actions
<input type="radio"/> 4-H Specialist	81619	Fac11/12	F2	Actions
<input type="radio"/> 4-H Youth Development Agent	80218	EPANFac	EN	Actions

**Navigate to the previous tab by clicking on the Prev button.**

**Search all EHRA class titles by clicking on "Filter these results"**

**Click the radio button next to the EHRA class title you want to select, then click "Save"**

**View an EHRA classification summary by clicking on "Actions".**

## **[EHRA Create New - Position Details Tab](#)**

Follow the instructions at the top of the page, making sure to fill out all required fields highlighted in **RED**, and then click the **Next>>** button to save changes and navigate to the next tab:

Pending Requests / ... / New Position Description / Senior Director for HR Communications / Edit

**Editing Pending Request**  
Position Action Justif...  
Classification  
**Position Details**  
Position Funding Infor...  
Add ADA Checklist Form  
EPA Designation Reques...  
Supplemental Documenta...  
Supervisor  
Pending Request Summary

**Position Details**

☒ Check spelling

Complete each field. Required fields must be completed to continue through the process.

**\* Required Information**

**Contact Information**

\* Contact Name  This field is required.

\* Contact Phone Number  This field is required.

\* Contact Email  This field is required.

Proxy (For Leave Reporting)

If the requested position is a leave-reporting position (11/12 month or EPA Staff)

Proxy Phone Number

Proxy Email

**Employee Information**

Faculty Rank (if applicable)  Please select

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

**Who is the proxy for leave reporting approvals?**

**Select faculty rank (if applicable) from drop down list.**

The screenshot shows the 'EHRA Create New – Position Details Tab' with three main sections: Classification Information, Position Overview, and Position Information. Red arrows point from callout boxes to specific fields in the form.

**Classification Information**

- Position/Classification Title: Assistant Director
- Job Code: 82229
- EPA Position Type: EPANFac

**Position Overview**

- Primary Purpose of Position:  This field is required.
- Primary Function of Organizational Unit:  This field is required.

**Position Information**

- Working Position Title: Senior Director for HR Communications
- Building and Room No.:
- Appointment Type:  This field is required.
- If Time Limited, Appointment Length:  If time limited, please indicate budget end date. If funded from more than one fund, indicate earliest end date. This field cannot be left blank if the "Time Limited" field above is checked selected.

**Callout 1:** Detailed information in the Position Overview and Position Information sections assist the DHR Class & Comp Analyst in performing an accurate analysis of the position.

**Callout 2:** 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.

## EHRA Create New – 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 Primary Responsibilities and Duties 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%:

selected."

**Primary Responsibilities and Duties**

Describe the major responsibilities and duties using the three categories of Instructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibilities and Duties Entry" button. Repeat for each category relevant to job functions. **Completion of at least one entry is required.** You will need to scroll back down to this section with each addition to enter a new category and add job duties. The total percentage of time allocated for all categories should equal 100%.

[Add Primary Responsibilities and Duties Entry](#)

**Supervisory**

\* Does this position supervise? Please select ▼ This field is required.

HELP TEXT: Supervisory positions conduct interviews, make final hiring decisions, provide salary recommendations, manage 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.

Number of Permanent Employees this Position Supervises

Percent of Time Spent

Click here to add the major responsibilities and duties - **1 entry is required.**

Clicking [Add Primary Responsibilities and Duties Entry](#) opens this section to enable entry of duties:

**Primary Responsibilities and Duties**

Describe the major responsibilities and duties using the three categories of Instructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibilities and Duties Entry" button. Repeat for each category relevant to job functions. **Completion of at least one entry is required.** You will need to scroll back down to this section with each addition to enter a new category and add job duties. The total percentage of time allocated for all categories should equal 100%.

\* Function Please select ▼

\* Describe the specific tasks and responsibilities related to the function.

\* Percentage of Time

☐ Remove Entry?

[Add Primary Responsibilities and Duties Entry](#)

Select function from the drop down list.

Describe specific tasks and responsibilities related to the function.

Indicate percentage of time spent performing tasks and responsibilities described.

Click to add more categories if needed.

## **EHRA Create New – 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.

HELP TEXT: Supervisory positions conduct interviews, make final hiring decisions, provide salary recommendations, manage 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

**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.

Select Yes or No from drop down list.

If Yes, then complete these fields.

Question is required to ensure NCAA compliance.

**Requirements and Preferences**

\* Is this position considered an essential position? Please select ▼ This field is required.

**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

**Information from this section is used to populate the job posting when it is time to recruit.**

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

Save << Prev Next >>

## **EHRA Create New - Position Funding Information Tab**

In the Funding Source Details section of this tab, you will indicate the funding source(s) for this position. Click on the **Add Funding Source Details Entry** button to enter budget and other required codes. **Select "Save" after each entry. PLEASE NOTE:** The annual amount budgeted must equal the requested salary.

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.

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. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **Next>>** to move to the next tab:

Home Position Descriptions Classifications My Profile Help

Line Butler, you have 0 messages. Supervisor logout

Pending Requests / ... / New Position Description / Senior Director for HR Communications / Edit

**Editing Pending Request**

- Position Action Justif...
- Classification
- Position Details
- Position Funding Infor...**
- Add ADA Checklist Form
- EPA Designation Reques...
- Supplemental Documenta...
- Supervisor
- Pending Request Summary

**Position Funding Information**

**IMPORTANT NOTE: Remember to click "Save" after each funding source is entered.**

\* Required Information

**Funding Source Details**

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source.

**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.**

Add Funding Source Details Entry

Save << Prev Next >>

**Select State or Non-State from drop down list.**

**If Non-State, select funding source from drop down list.**

**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.**

**Enter date funds end (if time-limited), annual amount, and percentage of FTE.**

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

State Appropriated Funding / Non-State Appropriated Funding: Please select

If non-state, select source of funding: Please select

Additional funding source information: If "Other" selected above, designate source. Provide position number if funds are being transferred from another position. Attach Budget Revision Form as Supplemental Document if necessary to transfer funds.

Is this position partially or fully funded on ARRA stimulus monies? ☐

Budget Code: Please select

Fund: Format: 6 digit number eeeee

Org: Format: 5 digit number eeeee

Account: Format: 5 digit number eeeee

Program: Format: 3 digit number eee

Date Funds End:

Annual Amount:

Percentage of FTE:

☐ Remove Entry?

Add Funding Source Details Entry

Save Next>>

## EHRA Create New - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)

\* Required Information

ADA Compliance Information

The physical activity of this position (Check all that apply and at least one)

- ☐ Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized. This factor is important if the amount and kind of climbing required exceeds that required for ordinary locomotion.
- ☐ Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. This factor is important if the amount and kind of balancing exceeds that needed for ordinary locomotion.
- ☐ Stooping: Bending body downward and forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
- ☐ Kneeling: Bending legs at knee to come to a rest on knee or knees.
- ☐ Crouching: Bending the body downward and forward by bending leg and spine.
- ☐ Crawling: Moving about on hands and feet.
- ☐ Reaching: Extending hand(s) and arm(s) in any direction.
- ☐ Standing: Particularly for sustained periods of time.
- ☐ Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another.
- ☐ Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.
- ☐ Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
- ☐ Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. This factor is important if it occurs to a considerable degree and requires the substantial use of the upper extremities and back muscles.
- ☐ Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.
- ☐ Grasping: Applying pressure to an object with the fingers and palm.
- ☐ Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of finger tips.
- ☐ Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
- ☐ Hearing: Perceiving the nature of sounds at normal speaking levels with or without correction. Ability to receive detailed information through oral communication, and to make fine discrimination in sound.
- ☐ Repetitive motions: Substantial movements (motions) of the wrists, hands, and/or fingers.

This field is required.

The physical requirements of this position (Select One)

Please select This field is required

Select one from the drop down list.

**Check all that apply and at least one in this section.**



**The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)**

- ☐ The worker is required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; extensive reading; visual inspection involving small defects, small parts, and/or op
- ☐ The worker is required to have visual acuity to perform an activity such as: operates machines such as lathes, drill presses, power saws and mills where the seeing job is at or within arm's reach; performs mechanical or skilled trades tasks of a non-re
- ☐ The worker is required to have visual acuity to operate motor vehicles or heavy equipment.
- ☐ The worker is required to have visual acuity to determine the accuracy, neatness, and thoroughness of the work assigned (i.e., custodial, food services, general laborer, etc.) or to make general observations of facilities or structures

This field is required.

**The condition the worker will be subject to in this position (Check all that apply and at least one)**

- ☐ The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes.
- ☐ The worker is subject to outside environmental conditions: No effective protection from the weather.
- ☐ The worker is subject to both environmental conditions: Activities occur inside and outside.
- ☐ The worker is subject to extreme cold: Temperatures typically below 32 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind or humidity.
- ☐ The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.
- ☐ The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the ambient noise level.
- ☐ The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.
- ☐ The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, exposure to high heat or exposure to chemicals.
- ☐ The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system of the skin: Fumes, odors, dusts, mists, gases or poor ventilation.
- ☐ The worker is subject to oils: There is air and/or skin exposure to oils and other cutting fluids.
- ☐ The worker is required to wear respirator.
- ☐ The worker frequently is in close quarters, crawl space, shafts, man holes, small enclosed rooms, small sewage and water line pipes, and other areas which could cause claustrophobia.
- ☐ The worker is required to function in narrow aisles or passage ways.
- ☐ The worker is exposed to infectious diseases.
- ☐ The worker is required to function around prisoners or mental patients.
- ☐ None: The worker is not substantially exposed to adverse environmental conditions (such as in typical office or administrative work).

This field is required.

**Check all that apply and at least one in this section.**

**Check all that apply and at least one in this section.**

Save << Prev Next >>

## EHRA Create New – EHRA Designation Request Form Tab

Complete the EHRA Designation Request Form when creating a new non-faculty position for review by Classification and Compensation to determine compliance with N.C.G.S. 126, 116 and UNC Policy 300.1.1. Please note the specific organizational chart requirements below. For more information about EHRA non-faculty definitions, see [http://www.northcarolina.edu/hr/hrab/HRAB\\_Submission\\_Process\\_2-2013.pdf](http://www.northcarolina.edu/hr/hrab/HRAB_Submission_Process_2-2013.pdf). Once complete, click Save in order to save your information

Home Position Descriptions Classifications | My Profile Help

Linc Butler, you have 0 messages.
Supervisor ▼
logout

Pending Requests / ... / New Position Description / Senior Director for HR Communications / Edit

**Editing Pending Request**

- Position Action Justif...
- Classification
- Position Details
- Position Funding Infor...
- Add ADA Checklist Form
- EPA Designation Reques...
- Supplemental Documenta...
- Supervisor
- Pending Request Summary

### EPA Designation Request Form

Save << Prev Next >>

✔ Check spelling ▼

Complete the EPA Designation Request Form when creating a new non-faculty position for review by Classification and Compensation to determine compliance with N.C.G.S. 126, 116 and UNC Policy 300.1.1. Please note the specific organizational chart requirements below. For more information about EPA non-faculty definitions, see [http://www.northcarolina.edu/hr/hrab/HRAB\\_Submission\\_Process\\_2-2013.pdf](http://www.northcarolina.edu/hr/hrab/HRAB_Submission_Process_2-2013.pdf)

This form is only necessary on a position modification if the change in responsibilities would place the position in a different EPA category.

**Request Details**

Institution

Division/School/College

Department

EPA Designation Requested Please select ▼

**Enter University information.**

**Select requested EHRA designation from the drop down list.**

**Proposed Position Information**



**Proposed Position Information** Complete all fields.

Proposed Title

Proposed Working Title (if different)

Proposed Position Number

Proposed JCAT Code

Current Status  Select current position status from the drop down list.

**Current Position Information (If Applicable)** Complete all fields.

Current Title

Name of Employee in Position

Name and Title of Supervisor

**Institutional Authorization (HR Use Only)** This section will be completed by HR.

Division of Human Resources will electronically submit completed form with the following required documentation: -A written justification for requested action to include specific reference to relevant elements in SAAO definition or Instructional/Research definitions. -A detailed position description. -An organizational chart that includes position titles, position numbers, position designations (SPA, EPA, SAAO), and employee names. \*As defined by SAAO Policy, paragraph I.A or I.B

Print Name

Title

Electronic Signature of HR Analyst via Email Submission

## **[EHRA Create New - Supplemental Documentation Tab](#)**

The **Supplemental Documentation 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:

**Supplemental Documentation** Save Prev Next >>

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
Other Document			Create New
			Choose Existing
Post Doctoral Evaluation			Add by URL

**Click "Actions", then select Upload New, Create New, Choose Existing, or Add by URL in order to upload an attachment.** 37

## [EHRA Create New - Supervisor Tab](#)

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **“Filter these results”** to search all supervisors by a key word. **PLEASE NOTE:** The selection list of supervisors is dependent on the **POSITION TYPE (SHRA or EHRA)** being created. To select a supervisor in a different Position Type (for example EHRA supervising SHRA), click on **“Filter these results”** and select the Position Type to which the supervisor of the position belongs. Then click on **“Search”** to access the list of supervisors in the selected Position Type.

To view one of the position descriptions in the list, click on the **“Actions”** link next to the classification title you want to view and select **“View”**, or click on the **Working Position Title**. To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click on the **Next>>** button located on both the top and bottom right-hand corners of the page.

**REMEMBER:** The positions that appear in this list are based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor):

The screenshot shows the 'Supervisor' tab in the system. The top navigation bar includes 'Home', 'Position Descriptions', 'Classifications', and 'My Profile'. The main content area displays a list of position descriptions under the heading 'Position Descriptions - Filter these results'. A table lists several positions, including 'EPA Position - 2', 'DHR EPA Position Test 1', 'Director', 'Assistant VC for HR', 'AVC for Student Affairs', and 'Assistant Vice Chancellor for Development'. Each row has an 'Actions' link. Annotations with red arrows point to various elements: 'Navigate to the previous tab by clicking on the “<<Prev” button.' points to the '<< Prev' button; 'Search all position descriptions by clicking on “Filter these results”.' points to the 'Filter these results' link; 'Click the radio button next to the position description you want to select, then click “Next>>”.' points to the radio button for 'Director'; 'View the position descriptions summary by clicking on “Actions”, then “View” or by clicking on the title.' points to the 'Actions' link for 'Assistant VC for HR'.

## [EHRA Create New - 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. The **Blue Circle Check** appears by those tabs for which all required information has been entered:

The screenshot shows the 'Summary' tab of a 'New Position Description: Senior Director for HR Communications (EPA)'. The current status is 'Draft'. The position type is 'EPA' and the section/unit is 'Human Resources'. The user 'Linc Butler' is the creator and owner. The 'Summary' tab is selected, showing a 'Position Action Justification' field. Annotations with red arrows point to: 'Click “Edit” to make edits to a tab.' pointing to the 'Edit' link next to 'Position Action Justification'; 'Blue Circle Check' pointing to a blue circle icon next to the 'Position Action Justification' field.

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.

Position Name	
Contact Phone Number	
Contact Email	
Proxy (For Leave Reporting)	
Proxy Phone Number	

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)"**:

Click on "Take Action On Pending Request", then select "Send to Department Head" to move the request to the next step in the approval workflow.

Take Action On Pending Request

WORKFLOW ACTIONS

- Keep working on this Pending Request
- Canceled (move to Canceled)
- Send to Department Head (move to Department Head)
- Canceled (move to Canceled)

You will then see the following **"Take Action"** box. You can enter comments in the **"Comments (optional)"** field that will be viewable in the History tab 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:

Take Action

Send to Department Head (move to Department Head)

Comments (optional)

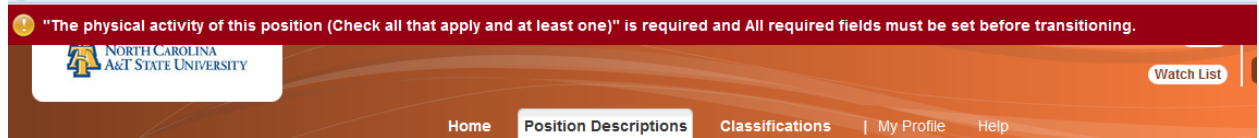
Comments are optional and can be viewed by the next level approver in the History tab.

☒ Add this pending request to your watch list?

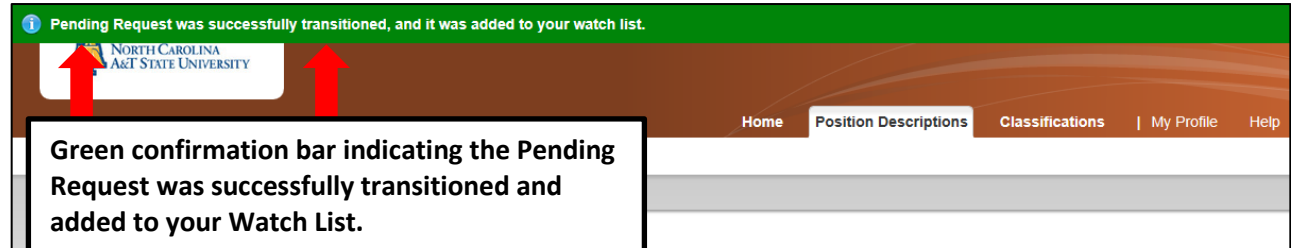
Adding the action to your Watch List allows you to easily track and monitor the action's progress.

Submit Cancel

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation.



Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:



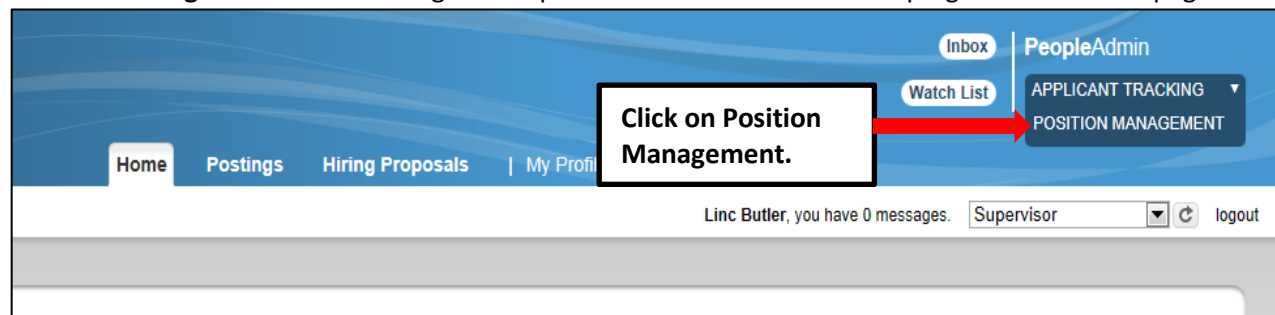
The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## Create New Position Description – Post Doctoral

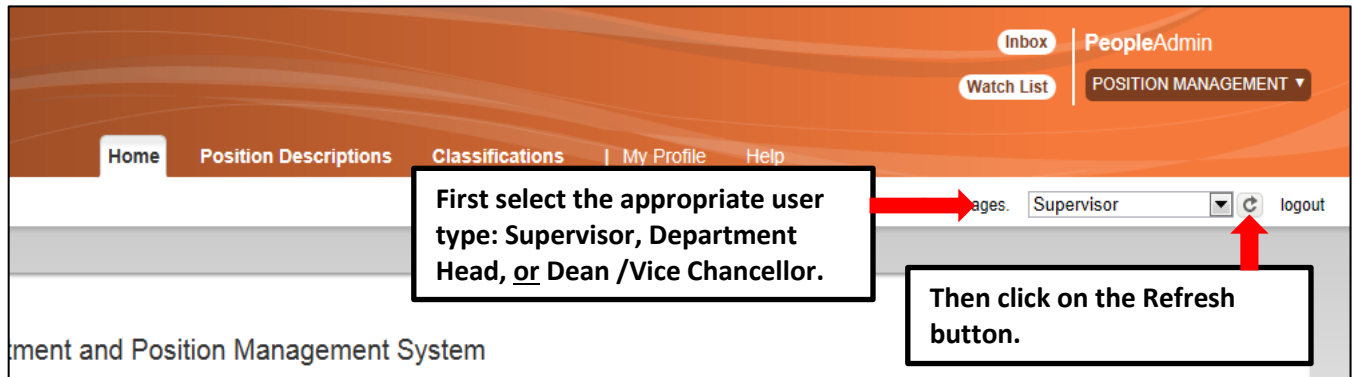
**IMPORTANT NOTE:** Prior to establishing and hiring for a Postdoctoral Associate position, Principal Investigators (PI) should review the [Postdoctoral Scholars Policy](#). Approval for program participation and proposed postdoc positions must be granted by the Vice Chancellor for the Division of Research and Economic Development (DORED) before initiating a request in this system. If approved, DORED will assign a position number.

The proposed effective date must be a future date, subject to change based on completion of all program requirements by the selected candidate and the date of hire. The requested salary, if entered, must reflect a budgeted available amount to be identified with a funding source and is subject to DHR and budget review and approval.

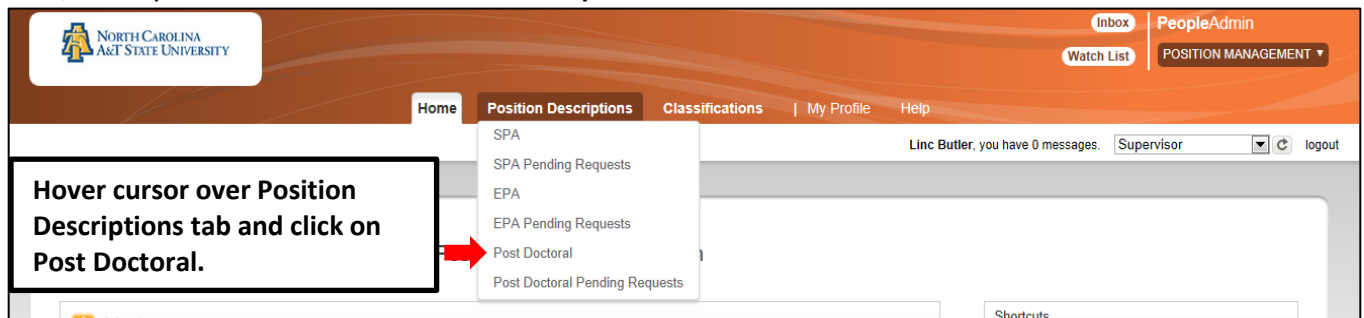
To initiate a **Create New Position Description** request for a Post Doctoral position, first switch to the **Position Management** module using the drop down menu located in the top right corner of the page:



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 **Create New Position Description** request:



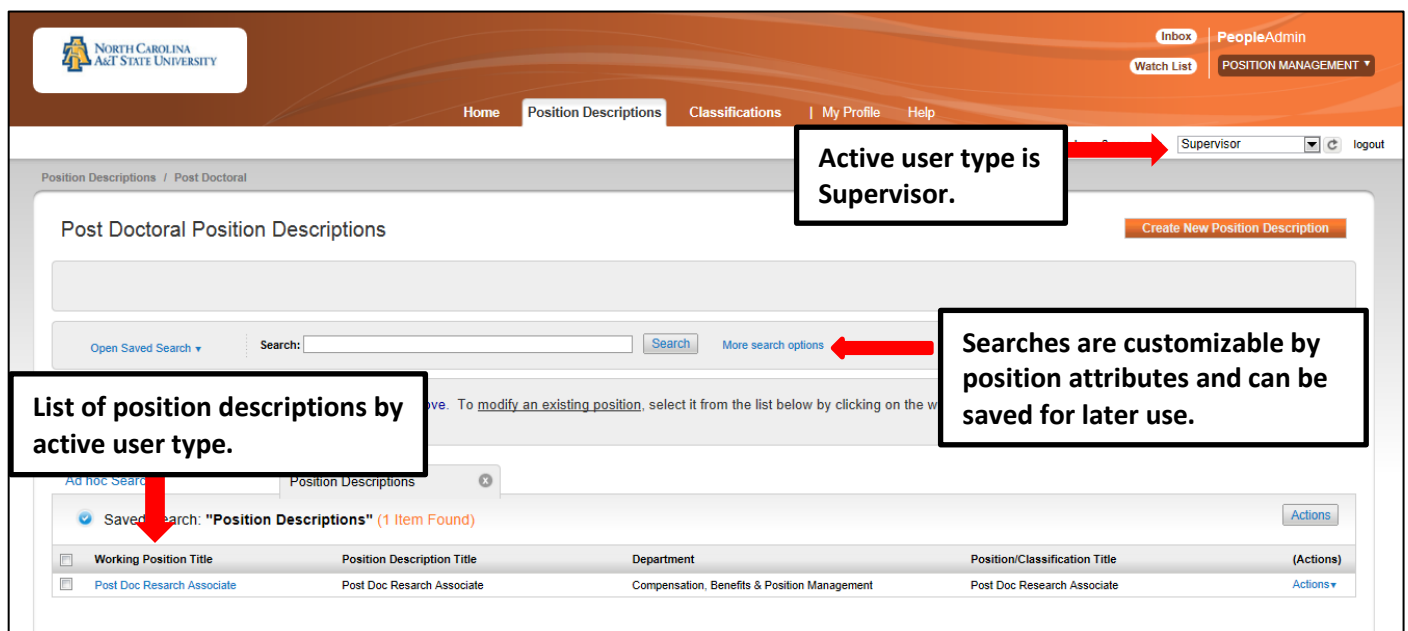
Next, hover your cursor over the **Position Descriptions** tab and click on “Post Doctoral”:



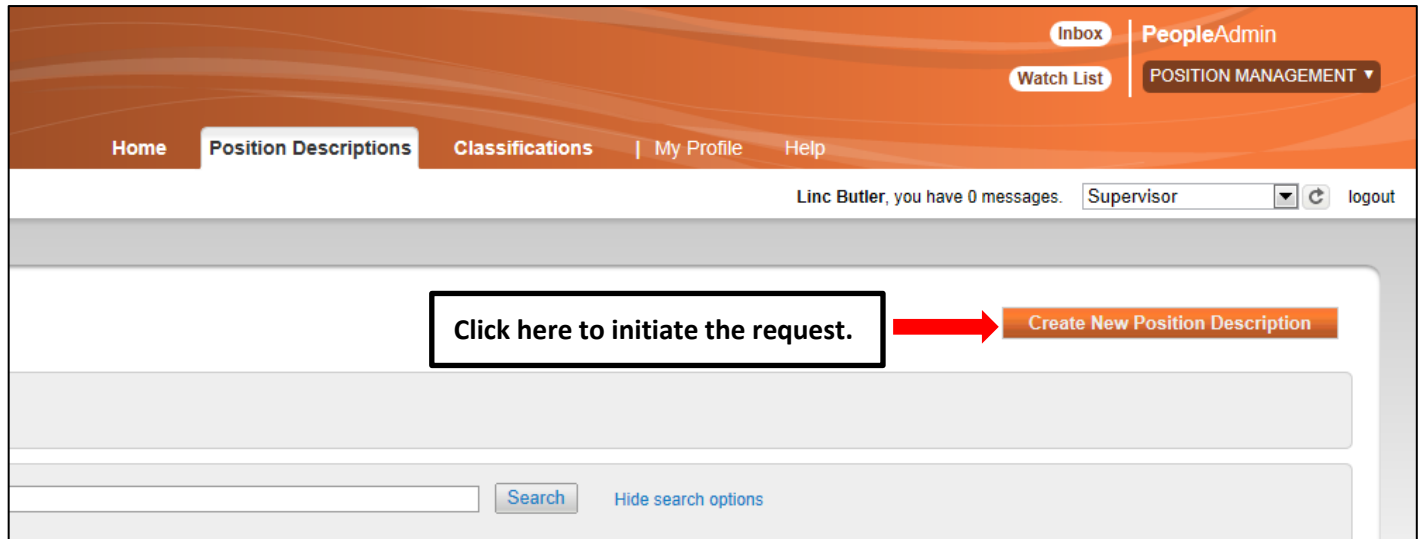
You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head	All positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	All positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

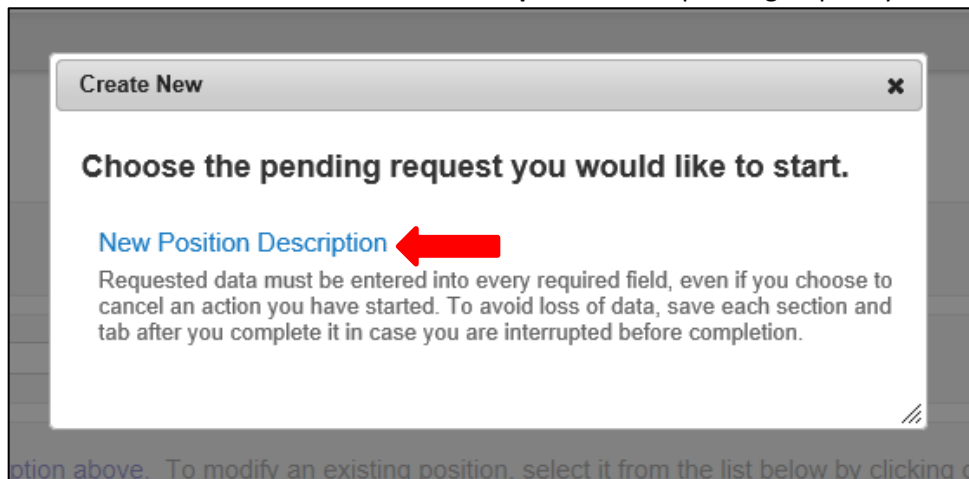
In the **Position Descriptions** view, you can search position descriptions by any number of criteria, including but not limited to position title, position number, employee name, supervisor name, or position status. Searches are fully customizable by position attributes, and you can save custom searches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



To initiate the request, click on the orange **“Create New Position Description”** button located on the top right of the screen just below the grey bar:



You will then click on **“New Position Description”** as the pending request you would like to start:



Enter the data fields for the **New Position Description** as follows then click the orange **“Start Pending Request”** button located on the top right corner of the page:

This screenshot shows the 'New Position Description' form. The form has several fields: 'Working Position Title' (text input), 'Organizational Unit' (text input), 'Department' (dropdown menu), and 'Section/Unit' (dropdown menu). A red arrow points from a text box '1. Enter the Working Title of the position.' to the 'Working Position Title' field. Another red arrow points from a text box '2. Select the department to which the position is assigned from the drop down list.' to the 'Department' dropdown. A third red arrow points from a text box '3. Select the Section/Unit to which the position is assigned from the drop down list.' to the 'Section/Unit' dropdown. A fourth red arrow points from a text box '4. Once all data fields are filled in, click Start Pending Request.' to the 'Start Pending Request' button. The 'Start Pending Request' button is orange, and the 'Cancel' button is grey. The breadcrumb trail shows 'Position Descriptions > Post Doctoral > New Position Description'. The user 'Linc Butler' is logged in with 0 messages.

## Post Doctoral Create New - Edit Pending Request Page - General Navigation

After clicking on the “**Start Pending Request**” button, you will then be taken into the **Position Action Justification tab**, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the **Next>>** button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the “**Save**” button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The Blue Check Circle also appears next to tabs that do not contain any required fields. (In this example, because the position had been previously approved, the required fields have been completed. It is important to remember to make the necessary revisions to all key fields in a modification action because in many cases, you will not receive “prompts” to update when a field is populated already).

The screenshot displays the 'Position Action Justification' tab within the 'Edit Pending Request' interface. The left-hand column contains a 'Tab list' with the following items: 'Position Action Justif...', 'Classification', 'Position Details', 'Position Funding Infor...', 'Add ADA Checklist Form', 'Supplemental Documents...', 'Supervisor', and 'Pending Request Summary'. The 'Position Action Justif...' tab is currently active and highlighted. The main content area is titled 'Position Action Justification' and includes a 'Check spelling' dropdown. Below this, there is a text area for 'Justification of Need for New Position' and a 'Proposed Effective Date' field, both of which are highlighted in red and labeled 'Required fields highlighted in RED.' with red arrows. The 'Proposed Effective Date' field is also labeled 'This field is required.' with a red arrow. At the bottom of the page, there are 'Save' and 'Next >>' buttons, both labeled 'Save and Next buttons.' with red arrows. A 'Blue Check Circle' is visible next to the 'Position Action Justif...' tab in the left-hand column, labeled 'Blue Check Circle' with a red arrow. A red arrow points from the 'Tab list' to the 'Position Action Justif...' tab. A red arrow points from the 'Save and Next buttons.' label to the 'Next >>' button. A red arrow points from the 'Required fields highlighted in RED.' label to the 'Proposed Effective Date' field. A red arrow points from the 'To stop and return to request later, click Start Pending Request.' label to the 'Start Pending Request' button in the bottom right corner.

**Tab list**

**Save and Next buttons.**

**To stop and return to request later, click Start Pending Request.**

**Blue Check Circle**

**Required fields highlighted in RED.**

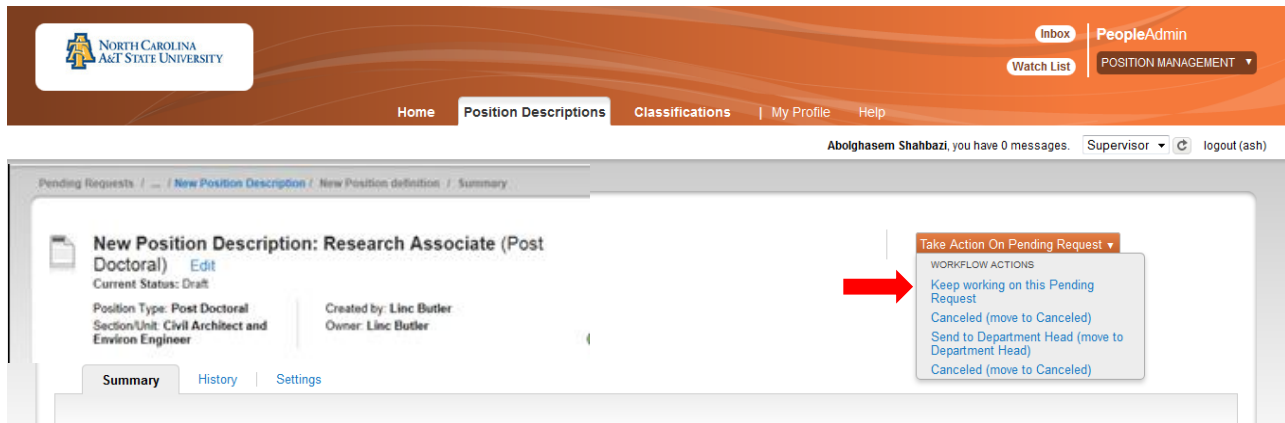
**Save and Next buttons.**



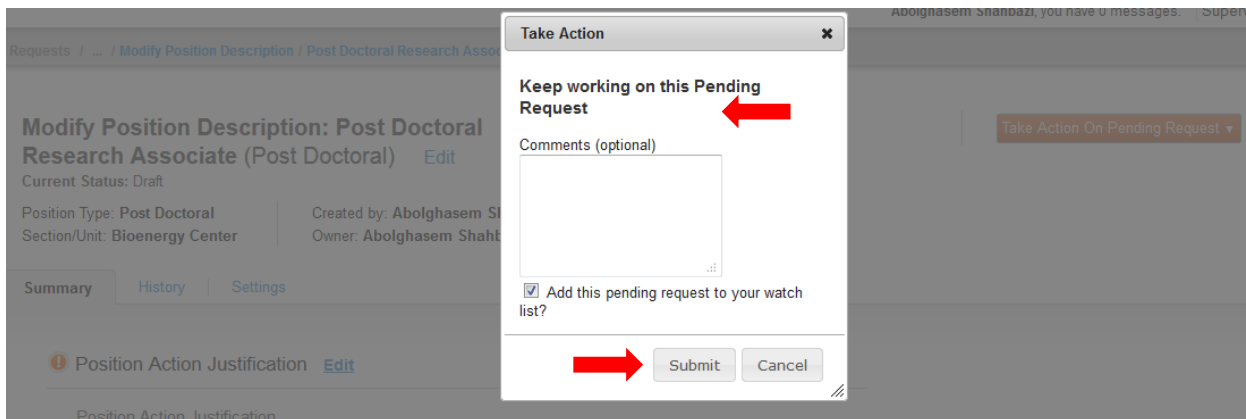
## Post Doctoral Create New - Saving to Return to a Pending Request Later

Also on the Editing Pending Request Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following these steps will ensure that all your work is saved when you open the request for completion.

- 1) Click the “Save” button located in either the top or bottom right corner
- 2) Select “Pending Request Summary” from the Tab List (illustrated above)
- 3) Select “Keep Working on this Pending Request”



- 4) Add any Comments into the window that opens (illustrated below) as notes to yourself, if desired
- 5) Click “Submit”



The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions** tab and click on “SHRA Pending Requests.”

You will then return to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.



## Post Doctoral Create New - Position Action Justification Tab

Prior to establishing and hiring for a Postdoctoral Associate position, Principal Investigators (PI) should review the [Postdoctoral Scholars Policy](#). Approval for program participation and proposed postdoc positions must be granted by the Vice Chancellor for the Division of Research and Economic Development (DORED) before initiating a request in this system. If approved, DORED will assign a position number.

The proposed effective date must be a future date, subject to change based on date of hire. The requested salary, if entered, must reflect a budgeted available amount to be identified with a funding source and is subject to DHR and budget review and approval. Once all fields are complete, click the **Next>>** button to save changes and navigate to the next tab:

**Why is a new position needed?**

**Must be a future date.**

**Funding to support the request must be secured PRIOR TO initiation of the request.**

**Provide the basis for EHRA status by describing the position role as Research or Instructional.**

**Link to NIH reference on Postdoctoral Salary Guidelines.**

## Post Doctoral Create New - Classification Tab

Select Post Doctoral Research Associate or Post Doctoral Teaching Associate by click on the **Radio Button** to the left of the classification title you want to select, then and click **"Save"** or the **Next>>** button located on both the top and bottom right-hand corners of the page.

To view a classification summary, click on the "Actions" link next to the classification title you want to view and select **View Classification**. To return from the summary, use the Back button located on the top left corner of your web browser.

Clicking on the **Position/Classification Title** will open the **View Classification** page in a new tab within your web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **Classification** tab and your request in progress. **PLEASE NOTE:** Clicking on the red "X" on the top right corner of your web browser will close the web browser and log you out of the system. You can navigate to the previous tab by clicking on the grey **"<<Prev"** button located between to the Save and Next buttons on the top right-hand corner of the page:

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

Pending Requests / ... / New Position Description / Research Associate / Edit

**Editing Pending Request**

- Position Action Justif...
- Classification**
- Position Details
- Position Funding Infor...
- Add ADA Checklist Form
- Supplemental Documenta...

**Classification**

Select Post Doctoral Research Associate or Post Doctoral Teaching Associate by clicking the selection button and then SAVE to select it. Then select **Next>>**

Please note that clicking on the Position/Classification title instead of the selection button will open a new tab. If you open the **Classifications** tab, you will need to close it to return to the **Position Descriptions** tab and your request in progress.

Classifications - [Filter these results](#)

Post Doc Classifications

Saved Search: "Post Doc Classifications" (2 Items Found)

Position/Classification Title	Job Code	EPA E-class	(Actions)
<input checked="" type="radio"/> <a href="#">Post Doc Research Associate</a>	81069	EN	<a href="#">Actions</a>
<input type="radio"/> <a href="#">Post Doc Teaching Associate</a>	81604	EN	<a href="#">Actions</a>

**Navigation:** Save << Prev Next >>

**Instructions:**

- Navigate to the previous tab by clicking on the "<<Prev" button.
- Click the radio button next to the Post Doc class title you want to select, then click "Save" and **Next>>**
- View a Post Doc classification summary by clicking on "Actions".

## Post Doctoral Create New – Position Details Tab

Follow the instructions at the top of the page, making sure to fill out all required fields highlighted in **red**, and then click the **Next>>** button to save changes and navigate to the next tab:

Pending Requests / ... / New Position Description / Research Associate / Edit

**Editing Pending Request**

- Position Action Justif...
- Classification
- Position Details**
- Position Funding Infor...
- Add ADA Checklist Form
- Supplemental Documenta...
- Supervisor
- Pending Request Summary

**Position Details**

Save << Prev Next >>

[Check spelling](#)

Complete each field. Required fields must be completed to continue through the process.

\* Required Information

**Contact Information**

- \* Contact Name  This field is required.
- \* Contact Phone Number  This field is required.
- \* Contact Email  This field is required.
- \* Proxy (For Leave Reporting)  This field is required.
- \* Proxy Phone Number  This field is required.
- \* Proxy Email  This field is required.

**Classification Information**

- \* Position/Classification Title Post Doc Research Associate
- Job Code 81069
- EPA E-class EN

**Instructions:**

- Who should be contacted if there are questions about the request?
- Who is the proxy for leave reporting approvals?

**Position Overview**

- \* Primary Purpose of Position This field is required.
- \* Primary Function of Organizational Unit This field is required.

**Position Information**

- \* Working Position Title: Research Associate
- Building and Room No. This field is required.
- \* Appointment Type: Please select This field is required.  
All Post Doctoral appointments are time limited. Departments should review the month-end payroll schedule to ensure all approvals are completed by budget officers and DHR no later than the established cut-off period for each month.
- \* If Time Limited, Appointment Length: This field is required.  
Please indicate budget end date. If funded from more than one fund indicate earliest end date.
- \* Appointment Period: Please select This field is required.

**Callouts:**

- 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 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.
- Select the appointment period from the drop down menu.

## **Post Doctoral Create New – Position Details Tab – Primary Responsibilities**

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 a post doctoral position, at **least one** of the three categories of Instructional, Research, and Administrative must be selected to describe the primary responsibilities of the job. Entry of only one will meet the minimum requirement for a job description.

To enter duties, click on the key button, “**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%:

**Primary Responsibilities and Duties**

Describe the major responsibilities and duties using the three categories of Instructional, Research, and Administrative. To enter duties please click the “Add Primary Responsibilities and Duties Entry” button. Repeat for each category relevant to job functions and SAVE after each category is added. **At least one entry is required** to complete a position description.

If the position requires duties in more than a single category, you will need to add multiple entries. The total percentage of time allocated for all categories should equal 100%.

A sample Post Doctoral Scholar position description is available for your reference at this link: [http://www.ncat.edu/hr/documents/post-doc/pd\\_job\\_description\\_template.doc](http://www.ncat.edu/hr/documents/post-doc/pd_job_description_template.doc). You may copy and paste wording from this template into the “Primary Responsibilities and Duties Entry.”

**Callouts:**

- Link to sample Post Doc position description.
- Click to add the major responsibilities and duties - **1 entry is required.**

### Primary Responsibilities and Duties

Describe the major responsibilities and duties using the three categories of Instructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibilities and Duties Entry" button. Repeat for each category relevant to job functions and SAVE after each category is added. **At least one entry is required** to complete a position description request.

If the position requires duties in more than a single category, you will need to **scroll back down to this section** to add another category and job duties. The total percentage of time allocated for all categories should equal 100%.

A sample Post Doctoral Scholar position description is available for your reference at this link: [http://www.ncat.edu/hr/documents/post-doc/pd\\_job\\_description\\_template.doc](http://www.ncat.edu/hr/documents/post-doc/pd_job_description_template.doc). You may copy and paste wording from this template into the "Primary Responsibilities and Duties Entry."

\* Function

Select function from the drop down list.

\* Describe the specific tasks and responsibilities related to the function.

Describe specific tasks and responsibilities related to the function.

\* Percentage of Time

Indicate percentage of time spent performing tasks and responsibilities described.

☐ Remove Entry?

[Add Primary Responsibilities and Duties Entry](#)

## Post Doctoral Create New – Position Details – Compliance and Requirements

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

### 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?

This field is required.

Question is required to ensure NCAA compliance.

### Requirements and Preferences

\* Is this position considered an essential position?  This field is required.

Information from this section is used to populate the job posting when it is time to recruit.

Normal Work Schedule

\* Department Required Skills

\* Date Ph.D. Conferred

A conferred Ph.D. degree awarded no more than 5 years prior to appointment is required.

A conferred Ph.D. degree awarded no more than 5 years prior to appointment is required for post doctoral employees.

\* Preferred Years Experience, Skills, Training, Education

Required License or Certification

\* Valid NC Driver's License required?  This field is required.

\* Commercial Driver's License Required?  This field is required.

\* Physical Required?  This field is required.

List any other medical/drug tests required

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

## Post Doctoral Create New - Position Funding Information Tab

In the Funding Source Details section of this tab, you will indicate the funding source(s) for this position. Click on the **Add Funding Source Details Entry** button to enter budget and other required codes. **Select "Save" after each entry.** PLEASE NOTE: The annual amount budgeted must equal the requested salary.

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.

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. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **"Next>>"** to move to the next tab:

Home | Position Descriptions | Classifications | My Profile | Help

Linc Butler, you have 0 messages. Supervisor [dropdown] [refresh] [logout]

Pending Requests / ... / New Position Description / Research Associate / Edit

**Editing Pending Request**

- Position Action Justif...
- Classification
- Position Details
- Position Funding Information**
- Add ADA Checklist Form
- Supplemental Documenta...
- Supervisor
- Pending Request Summary

**Position Funding Information**

**IMPORTANT NOTE:** Remember to click "Save" after each funding source is entered.

\* Required Information

**Funding Source Details**

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source.

[Add Funding Source Details Entry](#)

[Save](#) [<< Prev](#) [Next >>](#)

[<< Prev](#) [Next >>](#)

\* State Appropriate Funding / Non-State Appropriated Funding: Please select [dropdown]

If non-state, select source of funding: Please select [dropdown]

Additional funding source information: [text field]

If "Other" selected above, designate source. Provide position number if funds are being transferred from another position. Attach Budget Revision Form as Supplemental Document if necessary to transfer funds.

Is this position partially or fully funded on ARRA stimulus monies? [checkbox]

\* Budget Code: Please select [dropdown]

\* Fund: [text field] Format: 6 digit number #####

\* Org: [text field] Format: 5 digit number #####

\* Account: [text field] Format: 5 digit number #####

\* Program: [text field] Format: 3 digit number ###

Date Funds End: [text field]

\* Annual Amount: [text field]

\* Percentage of FTE: [text field]

☐ Remove Entry?

[Add Funding Source Details Entry](#)

**Coordinate with DORED on funding source information.**

**Enter date funds end (if time-limited), annual amount, and percentage of FTE.**

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

[Save](#) [<< Prev](#) [Next >>](#)



## Post Doctoral Create New - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click “Next>>” to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)

\* Required Information

ADA Compliance Information

The physical activity of this position (Check all that apply and at least one)

☐ Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized. This factor is important if the amount and kind of climbing required exceeds that required for ordinary locomotion.

☐ Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. This factor is important if the amount and kind of balancing exceeds that needed for ordinary locomotion.

☐ Stooping: Bending body downward and forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.

☐ Kneeling: Bending legs at knee to come to a rest on knee or knees.

☐ Crouching: Bending the body downward and forward by bending leg and spine.

☐ Crawling: Moving about on hands and feet.

☐ Reaching: Extending hand(s) and arm(s) in any direction.

☐ Standing: Particularly for sustained periods of time.

☐ Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another.

☐ Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.

☐ Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.

☐ Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. This factor is important if it occurs to a considerable degree and requires the substantial use of the upper extremities and back muscle.

☐ Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.

☐ Grasping: Applying pressure to an object with the fingers and palm.

☐ Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of finger tips.

☐ Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.

☐ Hearing: Perceiving the nature of sounds at normal speaking levels with or without correction. Ability to receive detailed information through oral communication, and to make fine discrimination in sound.

☐ Repetitive motions: Substantial movements (motions) of the wrists, hands, and/or fingers.

This field is required.

The physical requirements of this position (Select One)

Please select ▼ This field is required.

Select one from the drop down list.

The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)

☐ The worker is required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; extensive reading; visual inspection involving small defects, small parts, and/or op

☐ The worker is required to have visual acuity to perform an activity such as: operates machines such as lathes, drill presses, power saws and mills where the seeing job is at or within arm's reach; performs mechanical or skilled trades tasks of a non-re

☐ The worker is required to have visual acuity to operate motor vehicles or heavy equipment.

☐ The worker is required to have visual acuity to determine the accuracy, neatness, and thoroughness of the work assigned (i.e., custodial, food services, general laborer, etc.) or to make general observations of facilities or structures

This field is required.

The condition the worker will be subject to in this position (Check all that apply and at least one)

☐ The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes.

☐ The worker is subject to outside environmental conditions: No effective protection from the weather.

☐ The worker is subject to both environmental conditions: Activities occur inside and outside.

☐ The worker is subject to extreme cold: Temperatures typically below 32 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind or humidity.

☐ The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.

☐ The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the ambient noise level.

☐ The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.

☐ The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, exposure to high heat or exposure to chemicals.

☐ The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system of the skin: Fumes, odors, dusts, mists, gases or poor ventilation.

☐ The worker is subject to oils: There is air and/or skin exposure to oils and other cutting fluids.

☐ The worker is required to wear respirator.

☐ The worker frequently is in close quarters, crawl space, shafts, man holes, small enclosed rooms, small sewage and water line pipes, and other areas which could cause claustrophobia.

☐ The worker is required to function in narrow aisles or passage ways.

☐ The worker is exposed to infectious diseases.

☐ The worker is required to function around prisoners or mental patients.

☐ None: The worker is not substantially exposed to adverse environmental conditions (such as in typical office or administrative work).

This field is required.

Save << Prev Next >>

Check all that apply and at least one in this section.

Check all that apply and at least one in this section.



## Post Doctoral Create New - Supplemental Documentation Tab

The **Supplemental Documentation 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](http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx) 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:

Click "Actions", then select Upload New, Create New, Choose Existing, or Add by URL in order to upload an attachment.

## Post Doctoral Create New - Supervisor Tab

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word. **PLEASE NOTE:** The selection list of supervisors is dependent on the **POSITION TYPE (SHRA or EHRA)** being created. To select a supervisor in a *different* Position Type (for example EHRA supervising SHRA), click on **"Filter these results"** and select the Position Type to which the supervisor of the position belongs. Then click on **"Search"** to access the list of supervisors in the selected Position Type.

To view one of the position descriptions in the list, click on the **"Actions"** link next to the classification title you want to view and select **"View"**, or click on the **Working Position Title**. To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click on the orange **"Next>>"** button located on both the top and bottom right-hand corners of the page.

**REMEMBER:** The positions that appear in this list are based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor):

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

Pending Requests / ... / New Position Description / Research Associate / Edit

**Editing Pending Request**

Position Action Justif...  
☒ Classification

Supervisor

Position Descriptions - [Filter these results](#)

Saved Search: "Position Descriptions" (1 Item Found)

Working Position Title	Position Description Title	(Actions)
<input checked="" type="radio"/> Post Doc Research Associate		View

Save << Prev Next >>

Click the radio button next to the position description you want to select, then click "Next>>".

Navigate to the previous tab by clicking on the "<<Prev" button.

Search all position descriptions by clicking on "Filter these results".

View the position descriptions summary by clicking on "Actions", then "View" or by clicking on the title.

## Post Doctoral Create New - 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. 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 [dropdown] logout

Pending Requests / ... / New Position Description / New Position definition / Summary

**New Position Description: Research Associate (Post Doctoral)** [Edit](#)

Current Status: Draft

Position Type: Post Doctoral Created by: Linc Butler  
 Section/Unit: Civil Architect and Environ Engineer Owner: Linc Butler

Take Action On Pending Request ▾

Summary | History | Settings

☒ Position Action Justification [Edit](#)


Position Action Justification

**Blue Circle Check**

Click "Edit" to make edits to a tab.

Test for New	Test
Currently:	blank
Proposed Effective Date	08/31/2013
Currently:	blank
Basis for EPA Status	Test

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:

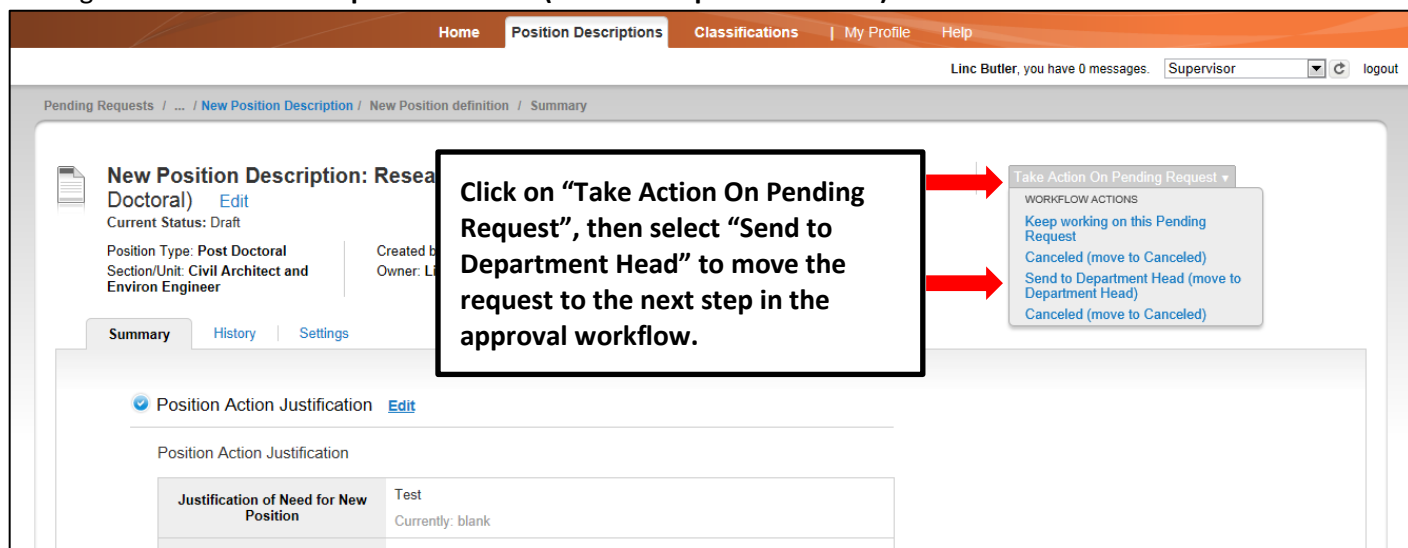
 Position Details [Edit](#)

Click "Edit" to make edits to a tab.

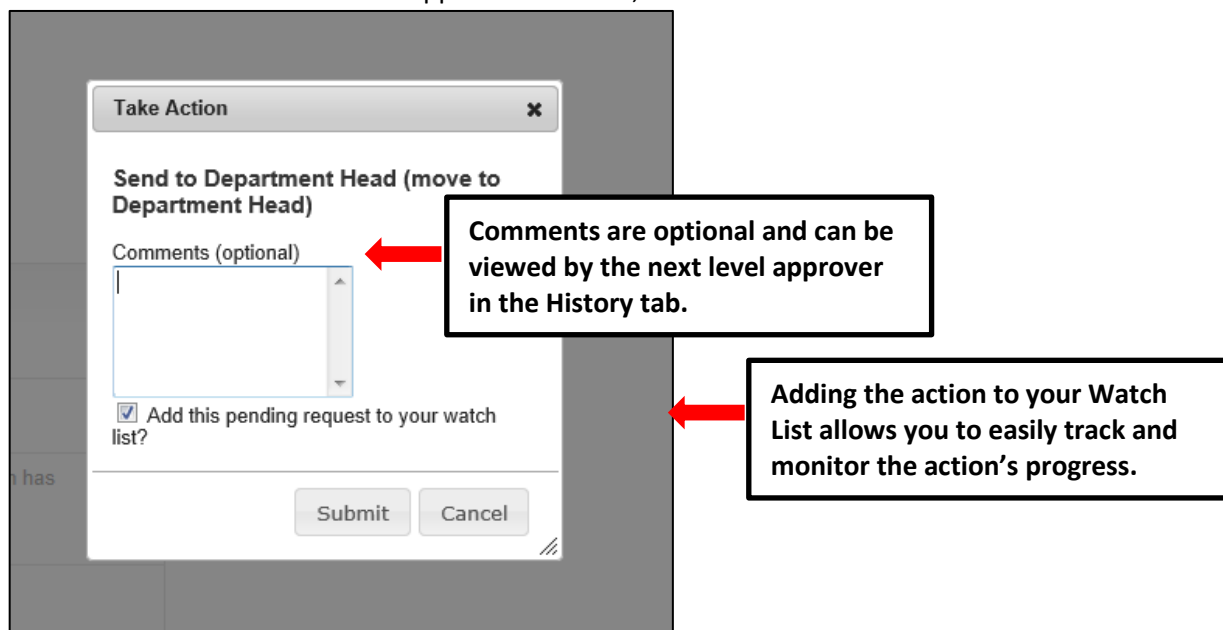
**Orange Circle Exclamation Point**

Position Name	
Contact Phone Number	
Contact Email	
Proxy (For Leave Reporting)	
Proxy Phone Number	

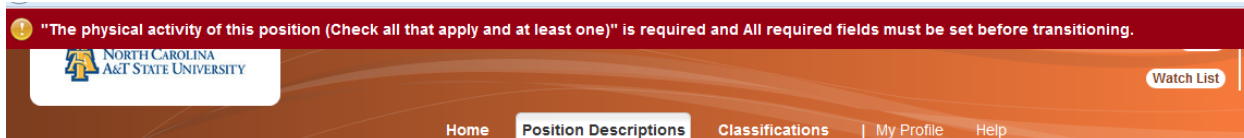
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **“Take Action on Pending Request”** button and selecting the appropriate routing action. In this example,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



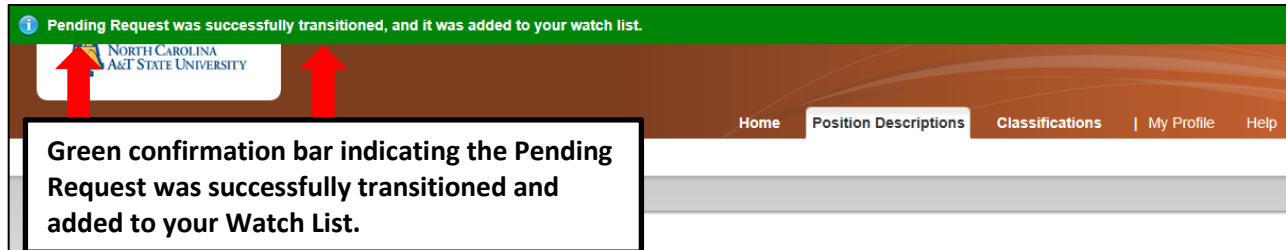
You will then see the following **“Take Action”** box. You can enter comments in the **“Comments (optional)”** field that will be viewable in the History tab by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When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



If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation.



Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

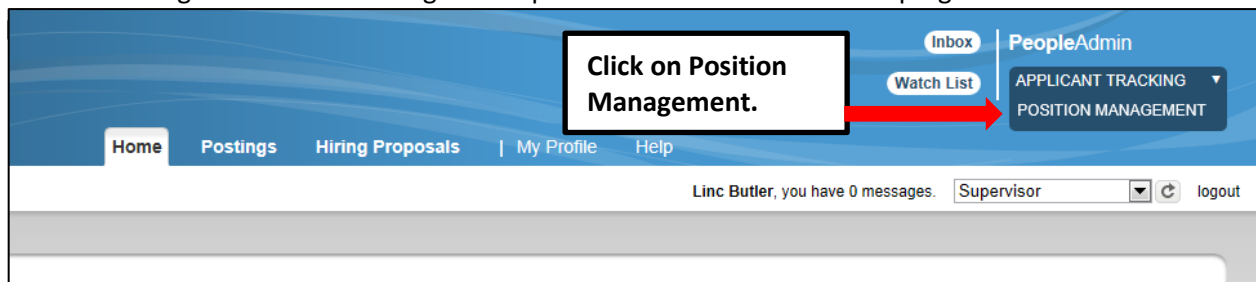


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

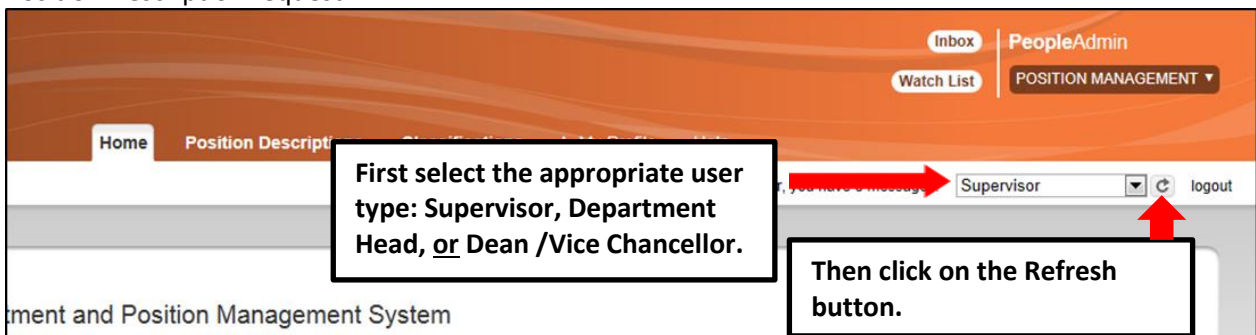
## Modify Position Description – SHRA

**IMPORTANT NOTE:** If the Modify action is being used to build an existing vacant position into People Admin 7 in order to initiate recruitment, the budgeted available amount will be confirmed in the approval process. If the Modify action is being used to request an increase or change in funding, identify a funding source PRIOR TO the initiation of the request. Budgeted funds are subject to review and approval.

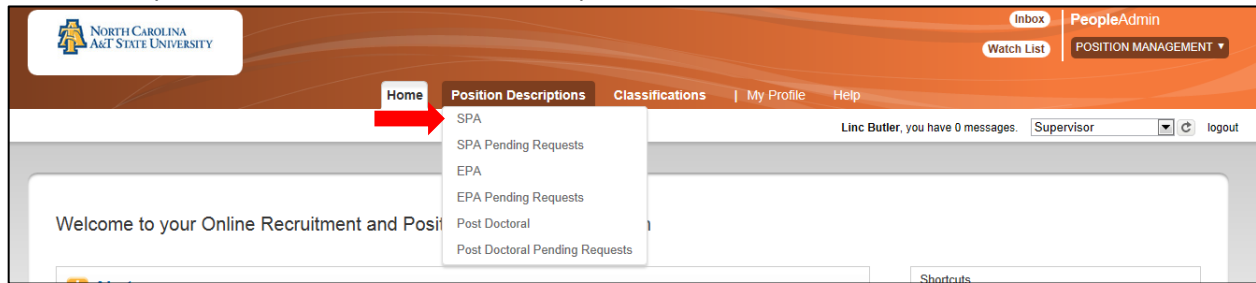
To initiate a Modify Position Description request for an SHRA position, first switch to the Position Management module using the drop down menu located in the top right corner of the



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:



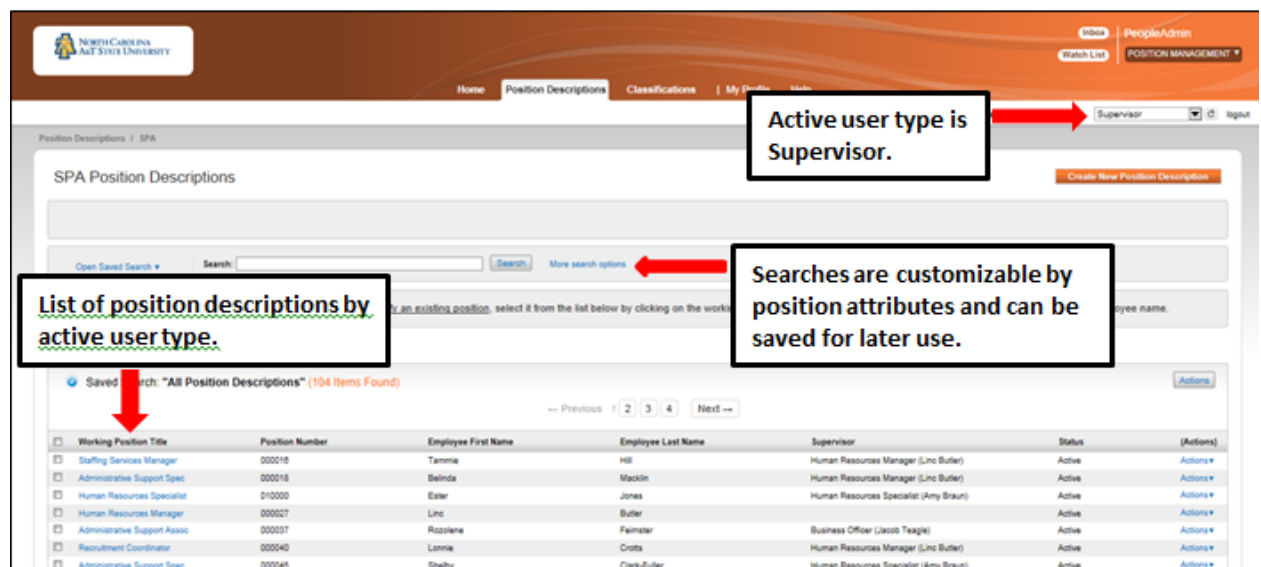
Next, hover your cursor over the Position Descriptions tab and click on “SHRA”:



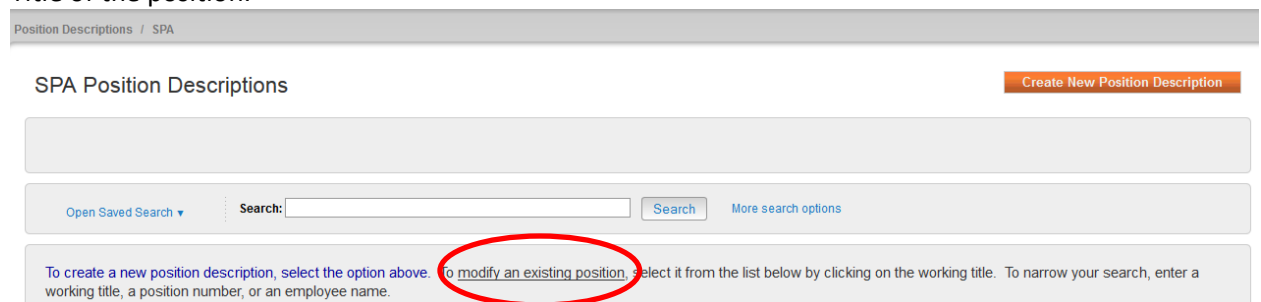
You will then be taken to the Position Descriptions view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head/Supervisor	All positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	All positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

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.



Ad hoc Search

All Position Descriptions

Saved Search: "All Position Descriptions" (5 Items Found)

Working Position Title	Position Number	Employee First Name	Employee Last Name	Supervisor	Status	(Actions)
Human Resources Specialist	010000	SPA	User1	Human Resources Specialist (Amy Braun)	Active	Actions
Administrative Support Spec	000045	Shelby	Clark-Fuller	Human Resources Specialist (Amy Braun)	Active	Actions
Human Resources Specialist	000046	Amy	Braun	Human Resources Manager (Linc Butler)	Active	Actions
Position Management Assistant	001111			Human Resources Specialist (Amy Braun)	Active	Actions
Compensation and Benefits Specialist	1234			Human Resources Specialist (Amy Braun)	Active	Actions

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

NORTH CAROLINA A&T STATE UNIVERSITY

Inbox PeopleAdmin

Watch List POSITION MANAGEMENT

Home Position Descriptions Classifications My Profile Help

Amy Braun, you have 0 messages. Supervisor logout

Position Descriptions / SPA / Human Resources Specialist

**Position Description: Human Resources Specialist (SPA)**  
 Current Status: Active  
 Position Type: SPA  
 Section/Unit: Compensation, Benefits & Position Management  
 Created by: System Account

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

Summary History

You will then be asked to confirm that you are ready to begin working on modifying this position description. The confirmation is important because once you begin work on this position number to revise the description, no other action can be initiated until all required fields are completed and the revised position description is **approved**.

When you have good notes in Word, a document from which to copy, and/or are familiar with the current purpose and duties of the position, click on **"Start"**:

Position Descriptions / SPA / Modify Position Description

**Start Modify Position Description Pending Request on Human Resources Specialist?**

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

**Start**

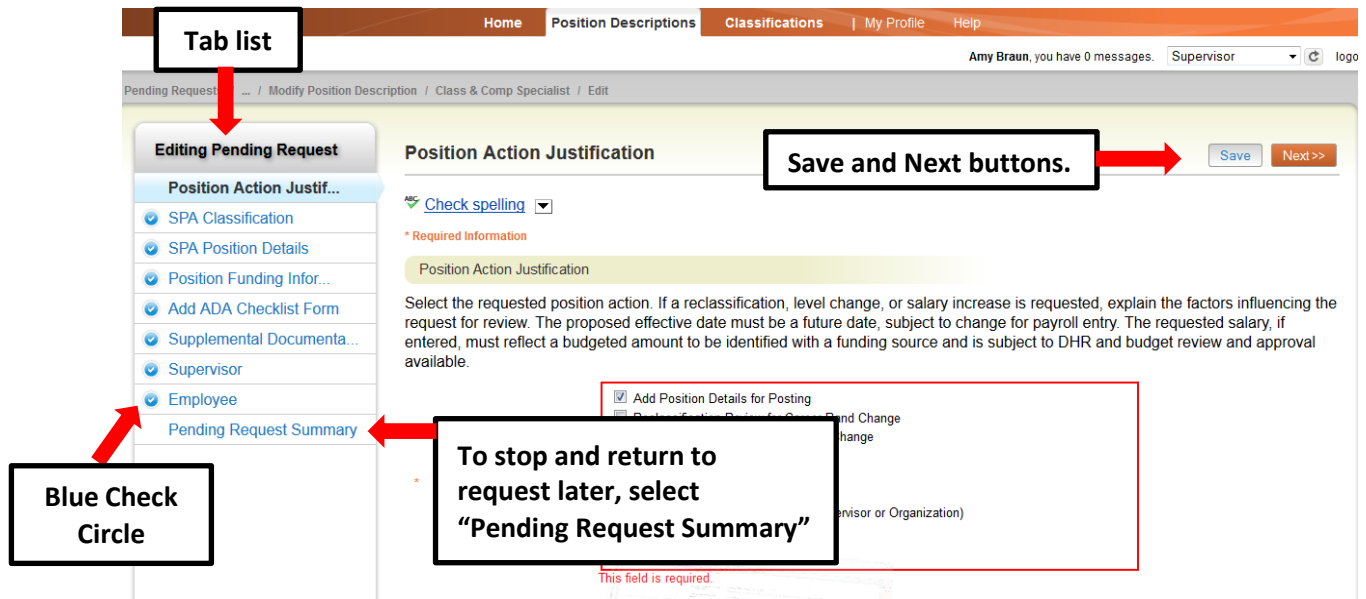
## SHRA Modify - Edit Pending Request Page - General Navigation

After clicking on the **"Start"** button, you will then be taken into the **Position Action Justification** tab, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you've made to the active tab you're working on and navigate to the next tab in the list simultaneously by clicking the orange **"Next>>"** button located in both the top and bottom right corners of the page. You can save the active tab you're working on and stay on the same tab by clicking the **"Save"** button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a Blue Check Circle will appear beside the tab. The Blue Check Circle also appears next to tabs that

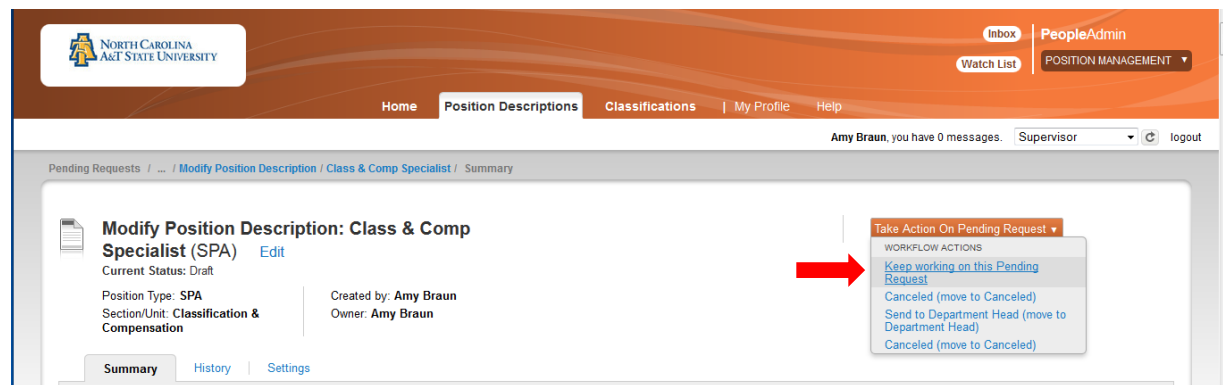
do not contain any required fields. (In this example, because the position had been previously approved, the required fields have been completed. It is important to remember to make the necessary revisions to all key fields in a modification action because in many cases, you will not receive “prompts” to update when a field is populated already).



## SHRA Modify - Saving to Return to a Pending Request Later

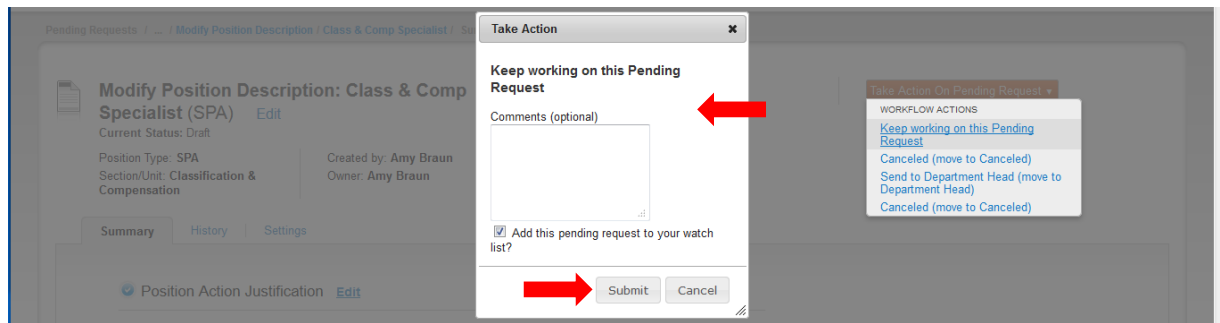
Also on the Editing Pending Request Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the “Save” button located in either the top or bottom right corner
- 2) Select “Pending Request Summary” from the Tab List (illustrated above)
- 3) Select “Keep Working on this Pending Request”



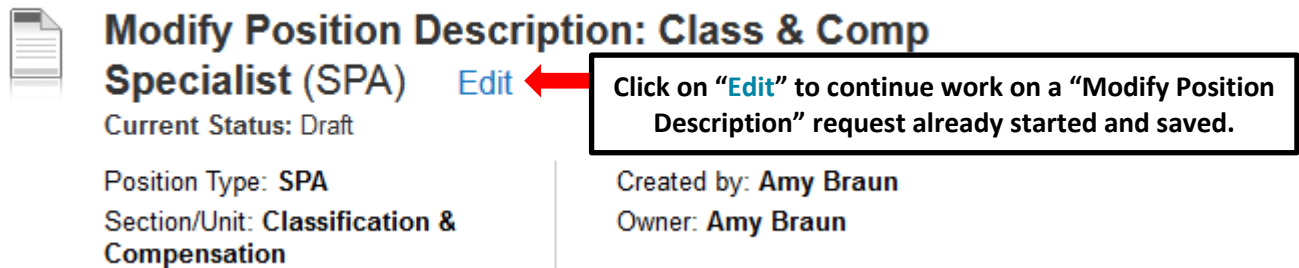
- 4) Add any Comments into the window that opens (below) as notes, if desired
- 5) Click “Submit”





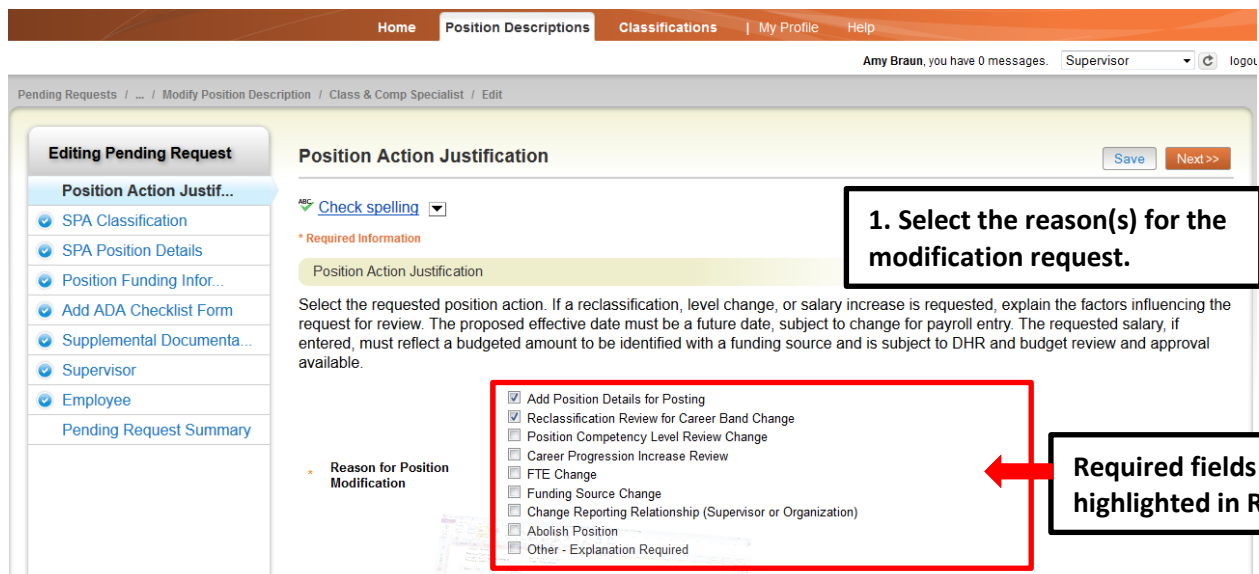
The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions tab** and click on “**SHRA Pending Requests.**”

You will then return to the **Position Descriptions view**, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.



## SHRA Modify - Position Action Justification Tab

The “**Modify Position**” action in PeopleAdmin 7 allows for a variety of actions to be requested and completed. These selections differ based on the classification of the position being modified. At least one option must be selected, but in some cases more than one option will be applicable (For example, if you are building a position description to create a posting for recruitment but also wish to have the career band reviewed for reclassification).



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.

Remember that the funding source for a budgeted change in the position salary **must be identified** if you

request an increase. Funding source details are entered on a later tab. As noted, any increase amount is subject to review and approval by the Division of Human Resources.

If you are requesting a reclassification, please enter the current classification in the designated field. Follow any other instructions; then click the **Next>>** button (located at both top and bottom right corners) to save changes and navigate to the next tab:

2. Describe why you are submitting the request.

3. Enter Current Classification if requesting change review

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

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

6. If requesting a budget/salary change, enter % of increase.

"Save" and "Next>>" buttons.

## SHRA Modify - Classification Tab

If you are **not** requesting a different career band, click on **Next>>** located in the orange box at the top right-hand corner of the page.

If you are requesting a different classification (career band), **scroll down below** the **Selected Classification** details and use **"Filter these results"** to search all position/classification (career band) titles by a key word. Your Class/Comp analyst in DHR can assist you in choosing a career band with related competencies most closely matching the revised business needs being met by the position.

Navigate to the previous tab by clicking on the "<<Prev" button.

Scroll Down below the Selected SHRA Classification Details to view or select other career band summaries.

This section summarizes the current classification's Description of Work, Competencies, Salary reference points for each level, and Minimum Requirements.

To view a different classification summary, Click on the arrow by “Actions” to the right of any title and select **View Classification**. To return from the summary, use the **Back** button located on the top left corner of your web browser. To **select** a different proposed classification and proceed with modifying the position, click on the **Radio Button** to the left of the title you want to select, and then click on the **Next>>** button located on both the top and bottom right-hand corners of the page.

Clicking on the “Position/Classification Title” will open the “View Classification” page in a new tab within our web browser. After reviewing the classification summary information, you will need to close this tab in order to return to the **SHRA Classification tab** and your request in progress. **PLEASE NOTE:** Clicking on the red “X” on the top right corner of your web browser will close the web browser and **log you out** of the system.

You can navigate to the previous tab by clicking on the grey **<<Prev**” button located between to the Save and Next buttons on the top right-hand corner of the page:

Each Classification summary includes a link to the entire Competency Profile

Search all SHRA class titles by clicking on “Filter these results”

Click the radio button next to the SHRA class title you want to select, then click “Save” and **Next>>**

View an SHRA classification summary by clicking on “Actions”.

Classification	Classification Status	(Actions)
Accountant	Approved	Actions
Accounting Manager	Approved	Actions
Accounting Technician	Approved	Actions
Administrative Support Assoc	Approved	Actions
Administrative Support Spec	Approved	Actions

## SHRA Modify - Position Details Tab

Follow the instructions at the top of the page, making sure to fill out all required fields highlighted in **RED**, and then click the orange “**Next>>**” button to save changes and navigate to the next 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.

Editing Pending Request

- Position Action Justif...
- SPA Classification
- SPA Position Details**
- Position Funding Infor...
- Add ADA Checklist Form
- Supplemental Documenta...
- Supervisor
- Employee
- Pending Request Summary

SPA Position Details

Save << Prev Next >>

Check spelling

Enter new data only into those fields which you are requesting to change by submitting this action.

\* Required Information

Contact Information

- Contact Name This field is required.
- Contact Phone Number This field is required.
- Contact Email This field is required.
- Proxy (For Leave Reporting) This field is required.
- Proxy Phone Number This field is required.
- Proxy Email This field is required.

Employee Information

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

Who is the proxy for leave reporting approvals?

**Current Employee's Information**  
will be loaded here, or position will show "Vacant."

Employee First Name Incumbent First Name  
Employee Last Name Incumbent Last Name  
Banner ID 950000000

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

SPA Classification Information  
Position/Classification Title Administrative Support Assoc  
Job Code 10421  
Requested Competency Level **Please select**  
Contributing  
Journey  
Advanced

**Enter current competency level, or requested level if a change is being requested.**

**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.**

**Indicates current budgeted salary in position**

**Position Overview**  
The competency profile linked to this page will provide assistance appropriate to the position. Requested Classification and Competency Level must be entered prior to approval by DHR.

\* Primary Purpose of Position  This field is required.

\* Primary Function of Organizational Unit  This field is required.

**Position Information**

\* Working Position Title Administrative Support Spec

Building and Room No.

Work Hours: From [time] to [time] on [days of week]  This field is required.

\* Hours per Week (##)  This field is required.

\* Appointment Type **Please select** This field is required.

If Time Limited, Appointment Length   
If time limited, please indicate budget end date. If funded from more than one fund, indicate earliest end date. This field cannot be left blank if the "Time Limited" field above is checked selected.

Current Budgeted Salary \$40,000

## SHRA Modify – Position Details Tab – Competencies and Related Job

**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 SHRA position **at least three of the competencies** required by the career band profile must be used to structure the position description and link the duties being performed to the classification/career band's functional competency areas. If desired and relevant, all of the listed competencies may be used.

After identifying the first competency area from the "Competencies" list relevant to the job, click on the key button, **"Add Competencies and Related Job Duties Entry."** A pull-down list of all SHRA competencies will allow you to select one from the list related to this career band. Type in duties and examples of assigned work relevant to that competency, and assign an approximate percentage of all work time spent

on those duties. Repeat these steps at least three times to capture the most important duties assigned to the position, those on which the employee will be evaluated.

Competencies from Classification

Competencies are knowledge, skills, and abilities that are required in the position to meet business needs. A specific group of competencies are demonstrated on the job and are utilized in the development of a position.

**Use only the competencies listed here.**

Using only those competencies listed below, describe the major job duties of the position related to at least three of the competencies required in the selected career band.

Competencies: Verbal Communication, Written Communication, Office Technology, Work Coordination, Problem Solving, Program Knowledge, Information/Records Administration, Budgeting

Competency Profile [link to OSP] <http://www.osp.state.nc.us/Guide/CompWebSite/Profiles/Admin%20Support%20Associate%20profile.pdf>

Competencies and Related Job Duties

To enter the job duties, please click the "Add Competencies and Related Job Duties Entry" button. Repeat for each competency. You will need to **scroll back down to this section** with each addition to enter a competency. The total percentage of time allocated for all the tasks and responsibilities must equal 100%.

Unless job duties are described in three competency areas, the system will prevent submission of this request.

**Click here to add competencies and related job duties - 3 entries are required.**

Add Competencies and Related Job Duties Entry

Unless job duties are described in three competency areas, the system will prevent submission of this request.

Competency: Please select

Describe the specific job duties related to this competency

Percentage Of Time

☐ Remove Entry?

Add Competencies and Related Job Duties Entry

**Select competency from the drop down list.**

**Describe specific job duties related to competency.**

**Indicate percentage of time spent performing duties described.**

## SHRA 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

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

**Select Yes or No from drop down list.**

**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.

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

Information from this section is used to populate the job posting when it is time to recruit.

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

**Save** **<< Prey** **Next >>**

## SHRA 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. Select "Save" after each entry. PLEASE NOTE: The annual amount budgeted must equal the requested salary.

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.

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:

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

Linc Butler, you have 0 messages. **Supervisor** **logout**

Pending Requests / ... / Modify Position Description / Administrative Support Assoc

**Editing Pending Request**

- Position Action Justif...
- SPA Classification
- SPA Position Details
- Position Funding Infor...**
- Add ADA Checklist Form
- Supplemental Documents
- Supervisor
- Pending Request Summary

**Position Funding Information**

**IMPORTANT NOTE:** Remember to click "Save" after each funding source is entered.

**Funding Source Details**

Indicate the funding source(s) for this position. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, click on Add Funding Source Details Entry to add an additional funding source.

**Add Funding Source Details Entry**

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.

**Save** **<< Prey** **Next >>**



2.5

**State Appropriated Funding / Non-State Appropriated Funding** Please select Select State or Non-State from drop down list.

**If non-state, select source of funding:** Please select If Non-State, select funding source from drop down list.

**Additional funding source information**  
If "Other" selected above, designate source. Provide position number if funds are being transferred from another position. Attach Budget Revision Form as Supplemental Document if necessary to transfer funds.

**Is this position partially or fully funded on ARRA stimulus monies?** ☐

**Budget Code** Please select

**Fund** Format: 6 digit number #####

**Org** Format: 5 digit number #####

**Account** Format: 5 digit number #####

**Program** Format: 3 digit number ###

**Date Funds End** 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.

**Annual Amount** Enter date funds end (if time-limited), annual amount, and percentage of FTE.

**Percentage of FTE**

☐ Remove Entry?

[Add Funding Source Details Entry](#)

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

## SHRA Modify - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

When modifying a position in the system the first time, all required sections must be completed. Subsequent modifications to the position may or may not require revision of the ADA requirements.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click "Next>>" to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)

**Required Information**

**ADA Compliance Information**

**The physical activity of this position (Check all that apply and at least one)**

☐ Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized. This factor is important if the amount and kind of climbing required exceeds that required for ordinary locomotion.

☐ Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. This factor is important if the amount and kind of balancing exceeds that needed for ordinary locomotion.

☐ Stooping: Bending body downward and forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.

☐ Kneeling: Bending legs at knee to come to a rest on knee or knees.

☐ Crouching: Bending the body downward and forward by bending leg and spine.

☐ Crawling: Moving about on hands and feet.

☐ Reaching: Extending hand(s) and arm(s) in any direction.

☐ Standing: Particularly for sustained periods of time.

☐ Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another.

☐ Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.

☐ Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.

☐ Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. This factor is important if it occurs to a considerable degree and requires the substantial use of the upper extremities and back muscles.

☐ Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.

☐ Grasping: Applying pressure to an object with the fingers and palm.

☐ Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of finger tips.

☐ Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.

☐ Hearing: Perceiving the nature of sounds at normal speaking levels with or without correction. Ability to receive detailed information through oral communication, and to make fine discrimination in sound.

☐ Repetitive motions: Substantial movements (motions) of the wrists, hands, and/or fingers.

**The physical requirements of this position (Select One)** Please select This field is required. Select one from the drop down list.

**Check all that apply and at least one in this section.**



The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)

The condition the worker will be subject to in this position (Check all that apply and at least one)

Check all that apply and at least one in this section.

Check all that apply and at least one in this section.

Complete this page by clicking on Save and Next>>

Save Next>>

## SHRA 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:

Home Position Descriptions Classifications My Profile Help

Link Butler, you have 0 messages Supervisor logout

Pending Requests / Modify Position Description / Administrative Support Assoc

Editing Pending Request

- Position Action Justif
- SPA Classification
- SPA Position Details
- Position Funding Infor
- Add ADA Checklist Form
- Supplemental Documents**
- Supervisor
- Pending Request Summary

Supplemental Documents

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 Choose Existing Add by URL
Other Document			
Post Doctoral Evaluation			

Click "Actions", then select Upload New, Create New, Choose Existing, or Add by URL in order to upload an attachment.

Save Cancel Print Next>>

## SHRA Modify - Supervisor Tab

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **“Filter these results”** to search all supervisors by a key word.

**PLEASE NOTE:** The selection list of supervisors is dependent on the POSITION TYPE (SHRA or EHRA) being created. To select a supervisor in a different Position Type (for example EHRA supervising SHRA), click on “Filter these results” and select the Position Type to which the supervisor of the position belongs. Then click on

“Search” to access the list of supervisors in the selected Position Type.

To view one of the position descriptions in the list, click on the **“Actions”** link next to the classification title you want to view and select **“View”**, or click on the **Working Position Title**. To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click on the orange **Next>>** button located on both the top and bottom right-hand corners of the page.

**REMEMBER:** The positions that appear in this list are based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor):

The screenshot shows the 'Supervisor' tab in the SHRA Modify interface. The top navigation bar includes 'Home', 'Position Descriptions', 'Classifications', and 'My Profile'. A callout box points to the '<< Prev' button, stating: 'Navigate to the previous tab by clicking on the “<<Prev” button.' Below the navigation bar, there's a 'Supervisor' section with a 'Filter these results' link. A callout box points to this link, stating: 'Search all position descriptions by clicking on “Filter these results”.' The main area displays a table of position descriptions with columns: 'Working Position Title', 'Position Number', 'Department', 'Position/Classification Title', and 'Actions'. A callout box points to the 'Actions' column, stating: 'View the position descriptions summary by clicking on “Actions”, then “View” or by clicking on the title.' On the left side, there's a sidebar with 'Editing Pending Request' and 'Classification' selected. A callout box points to the radio button next to a position description, stating: 'Click the radio button next to the position description you want to select, then click “Next>>”.' The table lists several positions, including 'EPA Position - 2', 'DHR EPA Position Test 1', 'Director', 'Assistant VC for HR', 'AVC for Student Affairs', and 'Assistant Vice Chancellor for Development'.

## SHRA 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:

The screenshot shows the 'Summary' tab in the SHRA Modify interface. The top navigation bar includes 'Home', 'Position Descriptions', 'Classifications', 'My Profile', and 'Help'. A callout box points to the 'Edit' link next to 'Position Action Justification', stating: 'Click “Edit” to make edits to a tab.' The main area displays the 'Modify Position Description: Administrative Support Assoc (SPA)' summary. It includes fields for 'Current Status: Draft', 'Position Type: SPA', 'Section/Unit: Classification & Compensation', 'Created by: Amy Braun', and 'Owner: Amy Braun'. A callout box points to the 'Position Action Justification' field, stating: 'Blue Circle Check'. The table below shows details for the new position, including 'Additional workload in the area of classification and compensation has necessitated the creation of an additional position.', 'Currently: blank', 'Effective Date: 08/01/2013', 'Currently: blank', and 'Requested Salary: \$55,000'. A 'Take Action On Pending Request' button is visible in the top right corner.

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:

**Orange Circle Exclamation Point**

Click **“Edit”** to make edits to a tab.

SPA Position Details [Edit](#)

Contact Information

Name	
Phone Number	
Email	
Proxy (For Leave Reporting)	
Proxy Phone Number	
Proxy Email	

SPA Classification Information

Position/Classification Title	Admin Support Associate
Job Code	10421
Requested Competency Level	

Position Overview

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)”**:

Click on **“Take Action On Pending Request”**, then select **“Send to Department Head”** to move the request to the next step in the approval workflow.

Take Action On Pending Request

WORKFLOW ACTIONS

- Keep working on this Pending Request
- Canceled (move to Canceled)
- Send to Department Head (move to Department Head)
- Canceled (move to Canceled)

Modify Position Description: Administrative Support Assoc (SPA) [Edit](#)

Current Status: Draft

Position Type: SPA Created by: Amy Braun

Section/Unit: Classification & Compensation Owner: Amy Braun

Benefits & Position Management

Summary History Settings

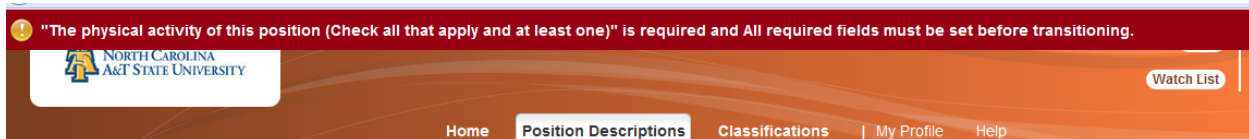
Position Action Justification [Edit](#)

Position Action Justification

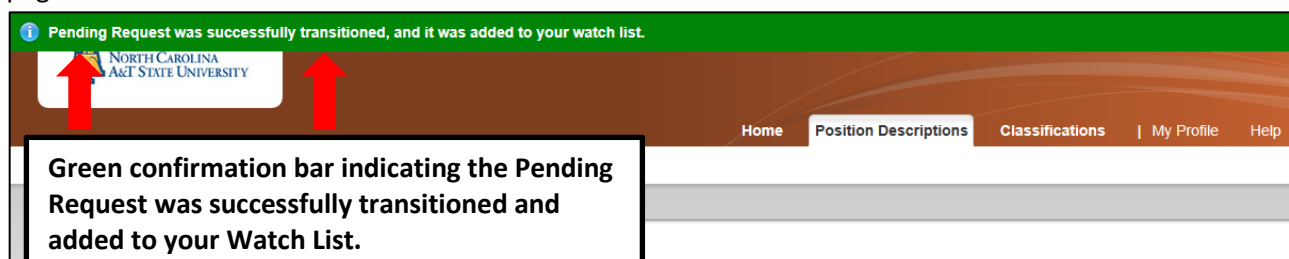
You will then see the following **“Take Action”** box. You can enter comments in the **“Comments (optional)”** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you’re ready to send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

The screenshot shows a 'Take Action' dialog box with a close button (X) in the top right corner. The main heading is 'Send to Department Head (move to Department Head)'. Below this is a text area labeled 'Comments (optional)'. A red arrow points from a callout box to this text area. The callout box contains the text: 'Comments are optional and can be viewed by the next level approver in the History tab.' Below the text area is a checkbox labeled 'Add this pending request to your watch list?'. A red arrow points from a second callout box to this checkbox. The second callout box contains the text: 'Adding the action to your Watch List allows you to easily track and monitor the action’s progress.' At the bottom of the dialog box are two buttons: 'Submit' and 'Cancel'.

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation.



Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

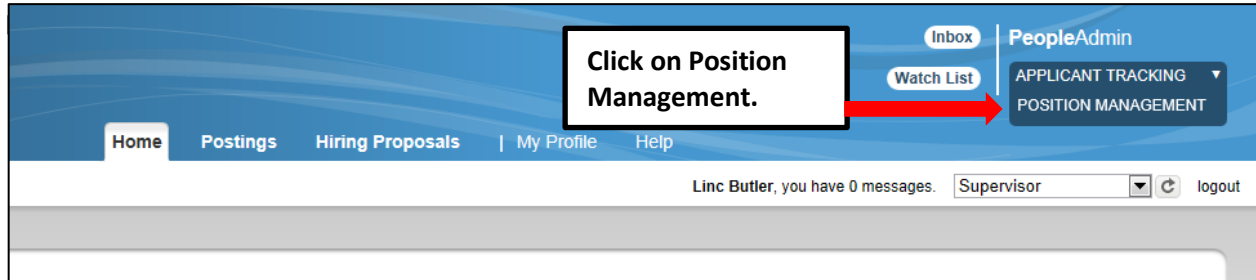


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## Modify Position Description – EHRA

IMPORTANT NOTE: If the Modify action is being used to build an existing vacant position into People Admin 7 in order to initiate recruitment, the budgeted available amount will be confirmed in the approval process. If the Modify action is being used to request an increase or change in funding, identify a funding source PRIOR TO the initiation of the request. Budgeted funds are subject to review and approval.

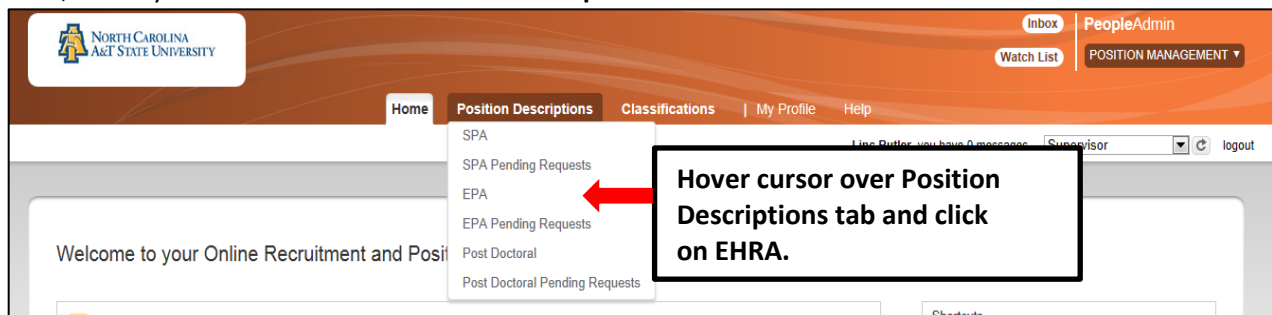
To initiate a Modify Position Description request for an EHRA position, first switch to the Position Management module using the drop down menu located in the top right corner of the



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":



You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head	All positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	All positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

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.

Annotations on the screenshot:

- Active user type is Supervisor.** (Points to the Supervisor dropdown menu)
- Searches are customizable by position attributes and can be saved for later use.** (Points to the 'More search options' link)
- List of position descriptions by active user type.** (Points to the 'Position Descriptions' link in the breadcrumb)

Working Position Title	Position Number	Department	Position/Classification Title	(Actions)
EPA Position - 2	75757	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.

Annotations on the screenshot:

- To modify an existing position.** (Circled in red, pointing to the instruction text)
- Assistant To Chancellor** (Highlighted with a red arrow in the table)

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.

Annotations on the screenshot:

- Modify Position Description** (Highlighted with a red arrow in the actions menu)

Position Description: Assistant Director (EPA) Edit

Current Status: Active

Position Type: EPA

Section/Unit: Director Athletics

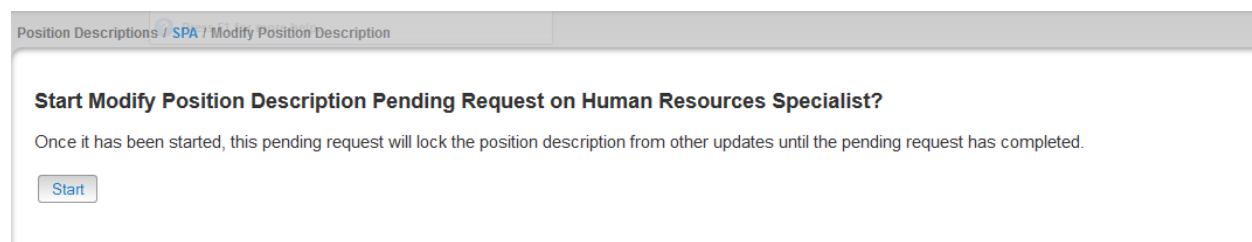
Created by: System Account

Take Action On Position Description

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



If you have good notes in Word, a document from which to copy, and/or are familiar with the current purpose and duties of the position, click on **“Start”**:

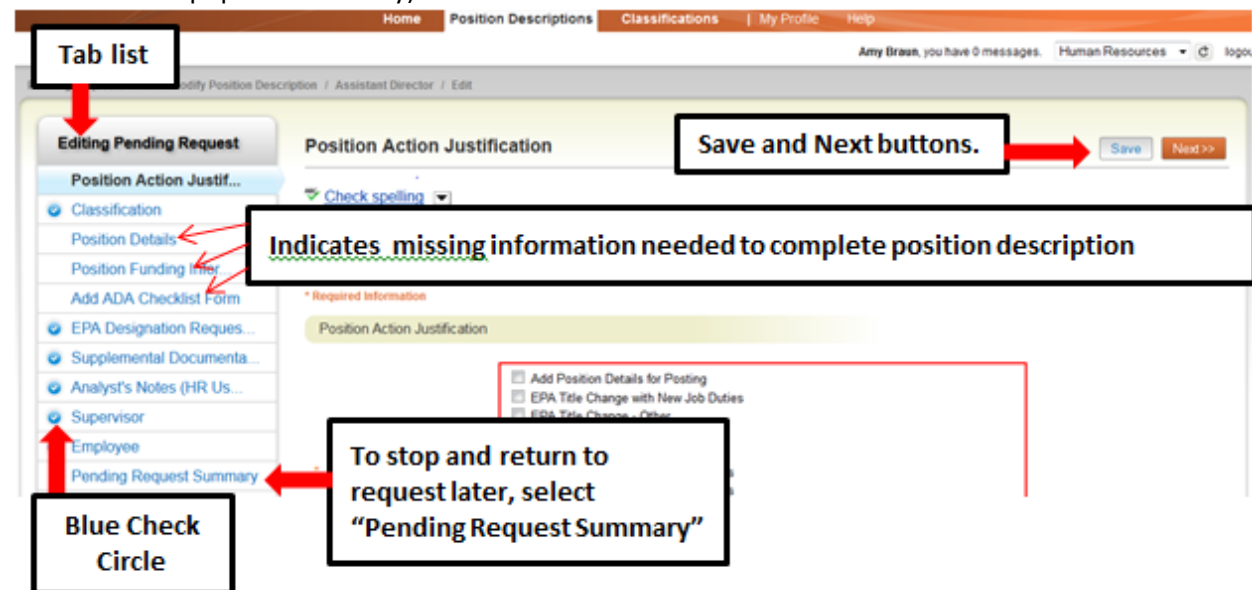


## **EHRA Modify - Edit Pending Request Page - General Navigation**

After clicking on the **“Start”** button, you will then be taken into the **Position Action Justification** tab, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the orange **“Next>>”** button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the **“Save”** button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a Blue Check Circle will appear beside the tab. The Blue Check Circle also appears next to tabs that do not contain any required fields. (In this example, because the position had been previously approved, the required fields have been completed. It is important to remember to make the necessary revisions to all key fields in a modification action because in many cases, you will not receive “prompts” to update when a field is populated already).

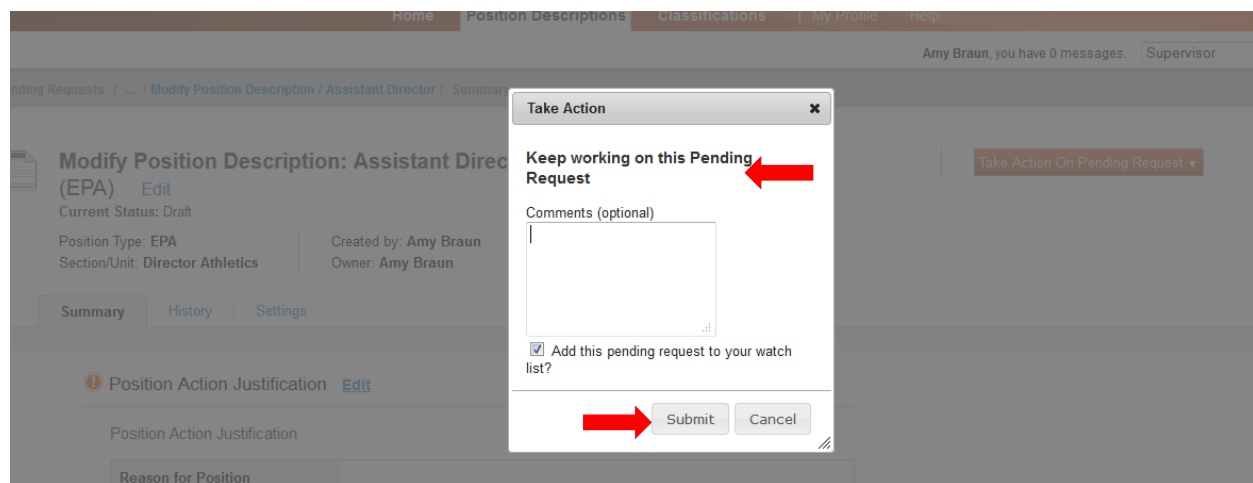
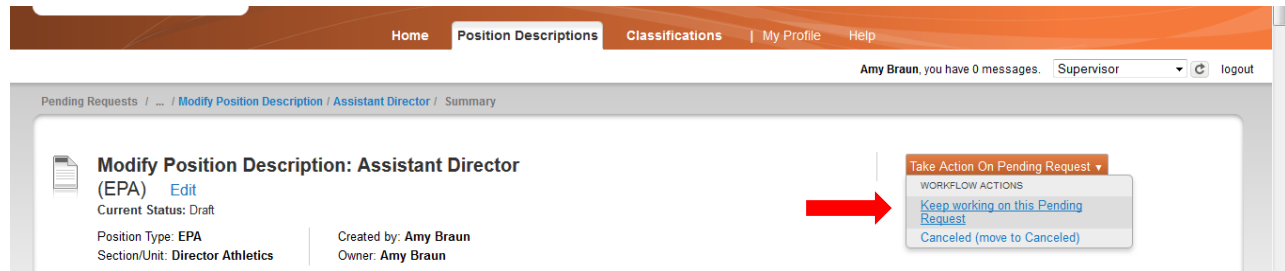




## **[EHRA Modify - Saving to Return to a Pending Request Later](#)**

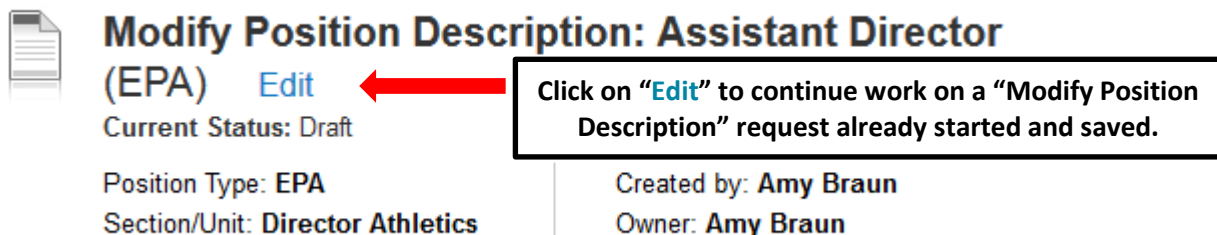
Also on the Editing Pending Request Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following these steps will ensure that all your work is saved when you open the request for completion.

- 1) Click the “Save” button located in either the top or bottom right corner
- 2) Select “Pending Request Summary” from the Tab List (illustrated above)
- 3) Select “Keep Working on this Pending Request”
- 4) Add any Comments into the window that opens (illustrated below) as notes to yourself, if desired
- 5) Click “Submit”



The **Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions** tab and click on “**SHRA Pending Requests.**”

You will then return to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.



## **EHRA Modify - Position Action Justification Tab**

The “**Modify Position**” action in PeopleAdmin 7 allows for a variety of actions to be requested and completed. These selections differ based on the classification of the position being modified. At least one option must be selected, but in some cases more than one option will be applicable (For example, if you are building a position description to create a posting for recruitment but also wish to change the EHRA Title or Rank).

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 Justif...**

- Classification
- Position Details
- Position Funding Infor...
- Add ADA Checklist Form
- EPA Designation Reques...
- Supplemental Documenta...
- Supervisor
- Employee
- Pending Request Summary

**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

- ☒ 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

Reason for Position Modification

This field is required.

**Required fields highlighted in RED.**

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

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.

Remember that the funding source for a budgeted change in the position salary **must be identified** if you request an increase. Funding source details are entered on a later tab. As noted, any increase amount is subject to review and approval by the Division of Human Resources.

If you are requesting an **EHRA Title Change**, please note the current title in the designated field. Follow any other instructions; then click the orange “**Next>>**” button (located at both top and bottom right corners) to save changes and navigate to the next tab:

**Explanation of Required 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” and “Next>>” buttons.**

[Save] [Next>>]

**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.**

## EHRA Modify - Classification Tab

If you are **not** requesting a change in EHRA title with this request, click at the top right-hand corner of the page.

**Next>>**

located in the orange box

**If Title is not changing, click here**

**Editing Pending Request**

- Position Action Justif...
- Classification**
- Position Details
- Position Funding Infor...
- Add ADA Checklist Form
- EPA Designation Reques...

**Classification**

Save << Prev Next >>

If you are not requesting a change in EPA title with this request, click on the orange "Next>>"

If you are requesting an EPA Title Change, scroll down below the Selected Classification Details to find a specific title by key word. The Position/Classification title selected here may be a more general title than the Position Working Title. Click the selection button to the left of any Title and then SAVE to select it. After selecting a saving a title, proceed by clicking

If in the process of viewing or changing a job/classification title you open the **Classifications** tab, you have opened a new window within the system and need to **close** the **Classifications** tab after reviewing the information. Closing this tab will return you to the **Position Descriptions** tab and your request in progress.

**Navigate to the previous tab by clicking on the "<<Prev" button.**

If you are requesting an **EHRA Title Change**, scroll down below the **Selected Classification Details** and select **"Filter these Results"** to search for a specific title by key word. The Position/Classification title selected here may be a more general title than the Position Working Title. Click the selection button to the left of any Title and then **SAVE** to select it. After selecting a saving a title, proceed by clicking **Next>>**

If there is no established EHRA Position/Classification Title which fits the role of the position you are modifying, select **"New Title."** An appropriate Position Title and Code will be assigned to the position by DHR based on a review of its duties.

**Supplemental Documenta...**

- Supervisor
- Employee
- Pending Request Summary

**Selected Classification**

EPA Classification Details

EPA Classification Information

Position/Classification	Assistant Director
Job Code	82229
EPA Position Type	EPANFac
EPA Eclass	EN

Classifications - [Filter these results](#)

Ad hoc Search

Position/Classification	EPA E-class	EPA Position Type	Job Code	(Actions)
<input checked="" type="radio"/> Associate Director	EN	EPANFac	81185	Actions
<input type="radio"/> Associate Dean	F2	Fac11/12	80836	Actions
<input type="radio"/> Associate Administrator	EN	EPANFac	81635	Actions
<input type="radio"/> Associate Dean/Assoc Professor	F2	Fac11/12	82324	Actions
<input type="radio"/> Associate Dean/Professor 9/10	F1	Fac 9/10	80045	Actions

**Click the radio button next to the SHRA class title you want to select, then click "Save"**

**Next>>**

**Use this filter to search EHRA Position/Classification Titles by key words; i.e., "Associate".**

If in the process of viewing or changing a job/classification title you open the **Classifications** tab, you have opened a new window within the system and need to **close** the **Classifications** tab after reviewing the information. Closing this tab will return you to the **Position Descriptions** tab and your request in progress. **PLEASE NOTE:** Clicking on the red "X" on the top right corner of your web browser will **close** the web browser and **log you out** of the system.

You can navigate to the previous tab by clicking on the grey "<<Prev" button located between to the Save and Next buttons on the top right-hand corner of the page (illustrated above).

## 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 the EHRA system. The left sidebar contains a menu with options: Position Action Justif..., Classification, Position Details (highlighted), Position Funding Infor..., Add ADA Checklist Form, EPA Designation Reques..., Supplemental Documenta..., Supervisor, Employee, and Pending Request Summary. The main content area is titled 'Position Details' and includes a 'Check spelling' button and a 'Save' button. Below this, there are several sections: 'Contact Information' with fields for Contact Name, Contact Phone Number, Contact Email, Proxy (For Leave Reporting), Proxy Phone Number, and Proxy Email; 'Employee Information' with fields for Employee First Name, Employee Last Name, Banner ID, and Faculty Rank; 'Classification Information' with fields for Position/Classification Title, Job Code, and EPA Position Type; 'Position Overview' with fields for Primary Purpose of Position and Primary Function of Organizational Unit; and 'Position Information' with fields for Position Working Title, Position Number, Building and Room No., Appointment Type, and If Time Limited, Appointment Length. Red arrows point from text boxes to specific fields, indicating required information or providing instructions.

**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%:

selected.\*

**Primary Responsibilities and Duties**

Describe the major responsibilities and duties using the three categories of Instructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibilities and Duties Entry" button. Repeat for each category relevant to job functions. **Completion of at least one entry is required.** You will need to scroll back down to this section with each addition to enter a new category and add job duties. The total percentage of time allocated for all categories should equal 100%.

[Add Primary Responsibilities and Duties Entry](#)

**Supervisory**

This field is required.

HELP TEXT: Supervisory positions conduct interviews, make final hiring decisions, provide salary recommendations, m supervision, develop work plans and conduct performance appraisals for PERMANENT employees. If this position per following.

Does this position supervise? ☐

Number of Permanent Employees this Position Supervises

Percent of Time Spent

**Click here to add the major responsibilities and duties - 1 entry is required.**

Clicking [Add Primary Responsibilities and Duties Entry](#) opens this section to enable entry of duties:

**Primary Responsibilities and Duties**

Describe the major responsibilities and duties using the three categories of Instructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibilities and Duties Entry" button. Repeat for each category relevant to job functions. **Completion of at least one entry is required.** You will need to scroll back down to this section with each addition to enter a new category and add job duties. The total percentage of time allocated for all categories should equal 100%.

\* Function

\* Describe the specific tasks and responsibilities related to the function.

\* Percentage of Time

☐ Remove Entry?

[Add Primary Responsibilities and Duties Entry](#)

**Select function from the drop down list.**

**Describe specific tasks and responsibilities related to the function.**

**Indicate percentage of time spent performing tasks and responsibilities described.**

**Click to add additional categories if needed.**

## Requirements

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

### Supervisory

\* Does this position supervise?
 

Please select

This field is required.

HELP TEXT: Supervisory positions conduct interviews, make training 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

Select Yes or No from drop down list.

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.

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

Information from this section is used to populate the job posting when it is time to recruit.

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) **FTVORG**- 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:

The image contains two screenshots of the Banner HR system interface, specifically the 'Position Funding' section. The top screenshot shows the 'Editing Pending Request' sidebar and the 'Position Funding' main area. A red box highlights the 'IMPORTANT NOTE: Remember to click "Save" after each funding source is entered.' with an arrow pointing to the 'Save' button. Another red box points to the 'Add Funding Source Details Entry' button with the text: '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.' The bottom screenshot shows the 'Funding Source Details' form. Red boxes and arrows provide instructions: 'Select State or Non-State from drop down list.' points to the 'State Appropriate' dropdown; 'If Non-State, select funding source from drop down list.' points to the 'Non-State' dropdown; a large box instructs to '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.' with arrows pointing to the 'Fund', 'Org', 'Account', and 'Program' fields; another box instructs to 'Enter date funds end (if time-limited), annual amount, and percentage of FTE.' with arrows pointing to the 'Date Funds End', 'Annual Amount', and 'Percentage of FTE' fields. A final box at the bottom right says 'Complete this page by clicking on Save and Next>>' with an arrow pointing to the 'Save' and 'Next>>' buttons.

## **EHRA Modify - Add ADA Checklist Form Tab**

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

When modifying a position in the system the first time, all required sections must be completed. Subsequent modifications to the position may or may not require revision of the ADA requirements.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click “Next>>” to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)



- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)

**Required Information**

**ADA Compliance Information**

The physical activity of this position (Check all that apply and at least one)

- ☐ Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized. This factor is important if the amount and kind of climbing required exceeds that required for ordinary locomotion.
- ☐ Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. This factor is important if the amount and kind of balancing exceeds that needed for ordinary locomotion.
- ☐ Stooping: Bending body downward and forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
- ☐ Kneeling: Bending legs at knee to come to a rest on knee or knees.
- ☐ Crouching: Bending the body downward and forward by bending leg and spine.
- ☐ Crawling: Moving about on hands and feet.
- ☐ Reaching: Extending hand(s) and arm(s) in any direction.
- ☐ Standing: Particularly for sustained periods of time.
- ☐ Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another.
- ☐ Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.
- ☐ Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
- ☐ Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. This factor is important if it occurs to a considerable degree and requires the substantial use of the upper extremities and back muscles.
- ☐ Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.
- ☐ Grasping: Applying pressure to an object with the fingers and palm.
- ☐ Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of finger tips.
- ☐ Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
- ☐ Hearing: Perceiving the nature of sounds at normal speaking levels with or without correction. Ability to receive detailed information through oral communication, and to make fine discrimination in sound.
- ☐ Repetitive motions: Substantial movements (motions) of the wrists, hands, and/or fingers.

This field is required.

The physical requirements of this position (Select One)

Please select  This field is required.

Select one from the drop down list.

Check all that apply and at least one in this section.

The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)

- ☐ The worker is required to have close visual acuity to perform an activity such as preparing and analyzing data and figures, transcribing, viewing a computer terminal, extensive reading, visual inspection involving small defects, small parts, and/or rig.
- ☐ The worker is required to have visual acuity to perform an activity such as: operates machines such as lathes, drill presses, power saws and mills where the seeing job is at or within arm's reach, performs mechanical or skilled trades tasks of a non-repetitive nature.
- ☐ The worker is required to have visual acuity to operate motor vehicles or heavy equipment.
- ☐ The worker is required to have visual acuity to determine the accuracy, neatness, and thoroughness of the work assigned (i.e., custodial, food services, general laborer, etc.) or to make general observations of facilities or structures.

This field is required.

The condition the worker will be subject to in this position (Check all that apply and at least one)

- ☐ The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes.
- ☐ The worker is subject to outside environmental conditions: No effective protection from the weather.
- ☐ The worker is subject to both environmental conditions: Activities occur inside and outside.
- ☐ The worker is subject to extreme cold: Temperatures typically below 32 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind or humidity.
- ☐ The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.
- ☐ The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the ambient noise level.
- ☐ The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.
- ☐ The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, exposure to high heat or exposure to chemicals.
- ☐ The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system of the worker: Fumes, odors, dusts, mists, gases or poor ventilation.
- ☐ The worker is subject to oils: There is an and/or skin exposure to oils and other cutting fluids.
- ☐ The worker is required to wear respirator.
- ☐ The worker frequently is in close quarters, crawl space, shafts, man holes, small enclosed rooms, small sewage and water line pipes, and other areas which could cause claustrophobia.
- ☐ The worker is required to function in narrow aisles or passage ways.
- ☐ The worker is exposed to infectious diseases.
- ☐ The worker is required to perform administrative work.
- ☐ None: The worker is not subject to any of the above conditions.

This field is required.

Complete this page by clicking on

Save and [Next>>](#)

Check all that apply and at least one in this section.

Check all that apply and at least one in this section.

Save Cancel Next >>

## [EHRA Modify - Designation Request Form Tab](#)

Complete the EHRA Designation Request Form ***only when*** modifying a position for review of EHRA Category change; for example, Instructional, Research, and Public Service position being converted to SAAO or a change in SAAO tier. These types of title changes will be reviewed by Classification and Compensation to determine compliance with N.C.G.S. 126, 116 and UNC Policy 300.1.1. Please note the specific organizational chart requirements below. For more information about EHRA non-faculty definitions, see [http://www.northcarolina.edu/hr/hrab/HRAB\\_Submission\\_Process\\_2-2013.pdf](http://www.northcarolina.edu/hr/hrab/HRAB_Submission_Process_2-2013.pdf). Once complete, click

The screenshot shows the 'EPA Designation Request Form' within a web application. The top navigation bar includes 'Home', 'Position Descriptions', 'Classifications', 'My Profile', and 'Help'. The user is logged in as 'Linc Butler' with 0 messages. The left sidebar shows a menu for 'Editing Pending Request' with options like 'Position Action Justif...', 'Classification', 'Position Details', 'Position Funding Infor...', 'Add ADA Checklist Form', 'EPA Designation Reques...', 'Supplemental Documenta...', 'Supervisor', and 'Pending Request Summary'. The main form area has a 'Check spelling' button and a description of the form's purpose. Below this, the 'Request Details' section contains fields for 'Institution', 'Division/School/College', 'Department', and 'EPA Designation Requested' (a dropdown menu). A red arrow points from the 'Institution' field to a callout box that says 'Enter University information.' Another red arrow points from the 'EPA Designation Requested' dropdown to a callout box that says 'Select requested EHRA designation from the drop down list.'

This section of the form is titled 'Proposed Position Information'. It contains several text input fields: 'Proposed Title', 'Proposed Working Title (if different)', 'Proposed Position Number', 'Proposed JCAT Code', and 'Current Status' (a dropdown menu). A red arrow points from the 'Current Status' dropdown to a callout box that says 'Select current position status from the drop down list.' Below this is the 'Current Position Information (If Applicable)' section, which includes fields for 'Current Title', 'Name of Employee in Position', and 'Name and Title of Supervisor'. A red arrow points from this section to a callout box that says 'Complete all fields.' The final section is 'Institutional Authorization (HR Use Only)', which includes fields for 'Print Name', 'Title', and 'Electronic Signature of HR Analyst via Email Submission'. A red arrow points from this section to a callout box that says 'This section will be completed by HR.' The bottom of the form has 'Save', '<< Prev', and 'Next >>' buttons.

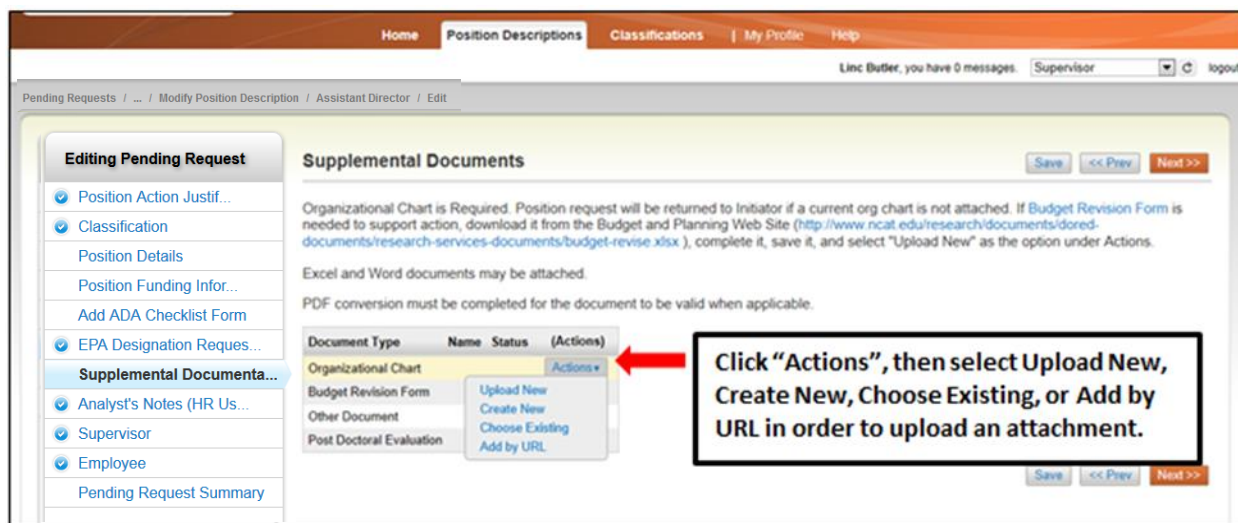
## **[EHRA Modify - Supplemental Documents Tab](#)**

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 Revision Form](http://www.ncat.edu/research/documents/dored-documents/research-services-documents/budget-revise.xlsx) 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 - Supervisor Tab](#)**

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word. **PLEASE NOTE:** The selection list of supervisors is dependent on the **POSITION TYPE** (SHRA or EHRA) being created. To select a supervisor in a different Position Type (for example EHRA supervising SHRA), click on **"Filter these results"** and select the Position Type to which the supervisor of the position belongs. Then click on **"Search"** to access the list of supervisors in the selected Position Type.

To view one of the position descriptions in the list, click on the **"Actions"** link next to the classification title you want to view and select **"View"**, or click on the **Working Position Title**. To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click on the orange **Next>>** button located on both the top and bottom right-hand corners of the page.

**REMEMBER:** The positions that appear in this list are based on your active user type (Supervisor, Department Head, Dean / Vice Chancellor):

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

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

**Editing Pending Request**

- Position Action Justif...
- ☒ **Classification**
- Position Details

**Supervisor**

Position Descriptions - Filter these results

Saved Search: "Position Descriptions" (6 Items Found)

Working Position Title	Position Number	Department	Position/Classification Title	(Actions)
EPA Position - 2	75767			Actions ▼
DHR EPA Position Test 1	12345			Actions ▼
Director				Actions ▼
Assistant VC for HR				Actions ▼
AVC for Student Affairs	22233			Actions ▼
Assistant Vice Chancellor for Development	44444	Compensation, Benefits & Position Management	Asst Vice Chanc Stu Dev	Actions ▼

**Annotations:**

- Navigate to the previous tab by clicking on the "<<Prev" button.
- Search all position descriptions by clicking on "Filter these results".
- Click the radio button next to the position description you want to select, then click "Next>>".
- View the position descriptions summary by clicking on "Actions", then "View" or by clicking on the title.

## **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 [dropdown] 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](#)

**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	
08/01/2013	
Currently: blank	
Requested Salary	\$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:

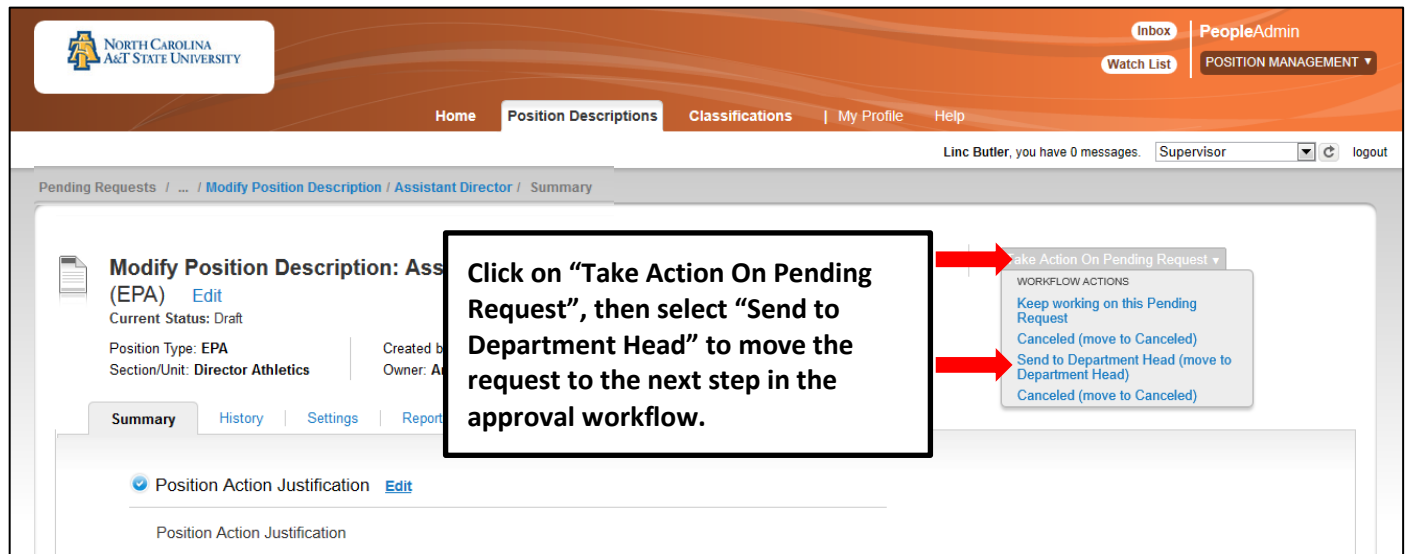
**Position Details** [Edit](#)

**Orange Circle Exclamation Point**

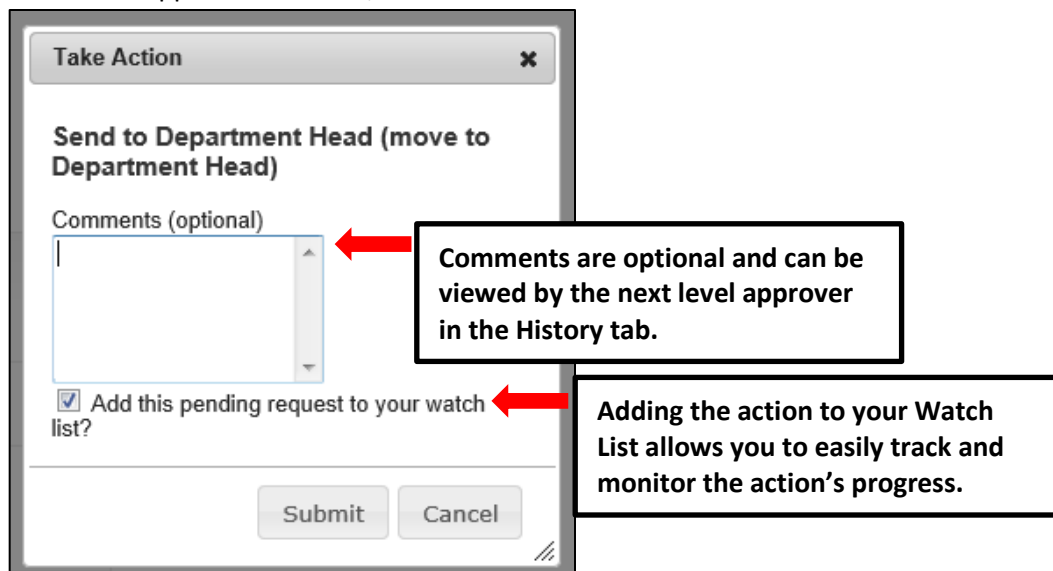
**Click "Edit" to make edits to a tab.**

Contact Phone Number
Contact Email

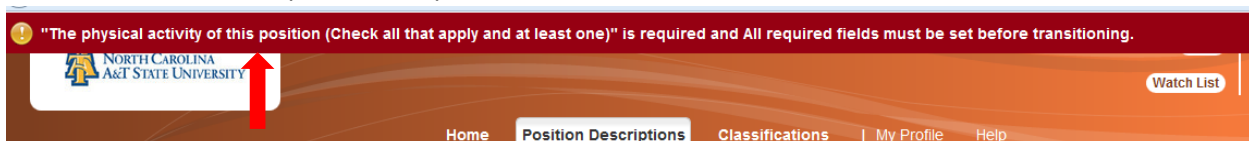
Once all required fields in all tabs are complete, and you are satisfied with the information entered, you can move the request to the next step in the approval workflow by clicking on the orange **“Take Action on Pending Request”** button and selecting the appropriate routing action. In this example,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

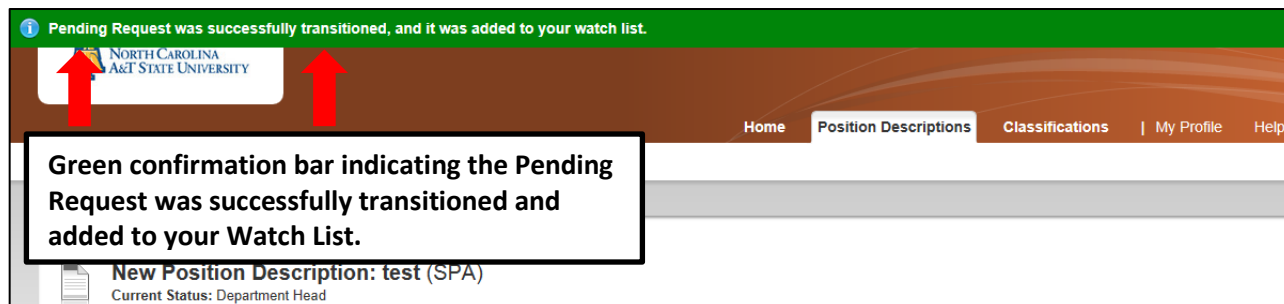


If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation.





Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:



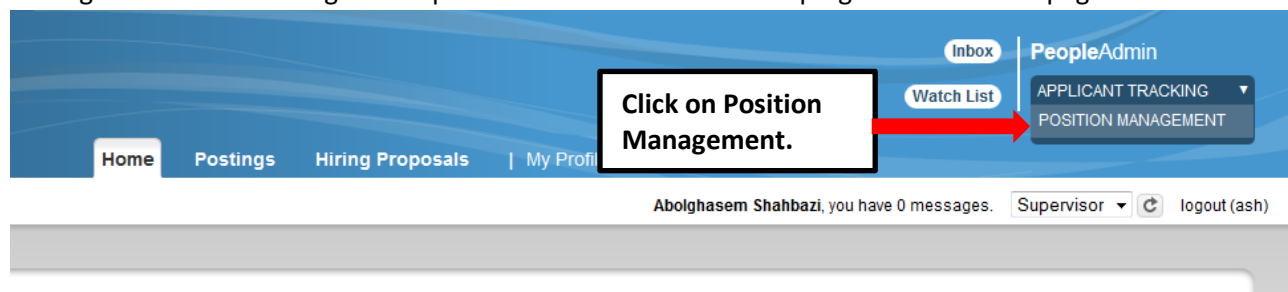
The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## **Modify Position Description – Post Doctoral**

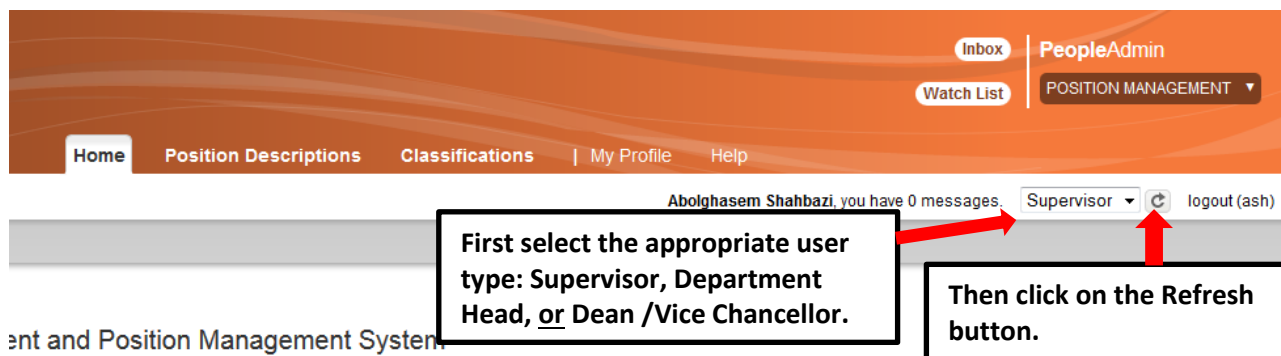
Prior to requesting a reappointment for a Postdoctoral Associate position, Principal Investigators (PI) should review the [Postdoctoral Scholars Policy](#). Approval for post doctoral reappointments positions must be granted by the Vice Chancellor for the Division of Research and Economic Development (DORED) before initiating a request in this system.

To request a postdoc's reappointment, the PI must complete and submit to the Vice Chancellor for Research the following: (1) a completed and signed original Postdoctoral Hiring Authorization Form, (2) a copy of the Postdoctoral Reappointment Letter, and (3) a copy of the Postdoctoral Scholar Annual Evaluation Form. These documents can be attached to the Supplemental Documentation tab through this system.

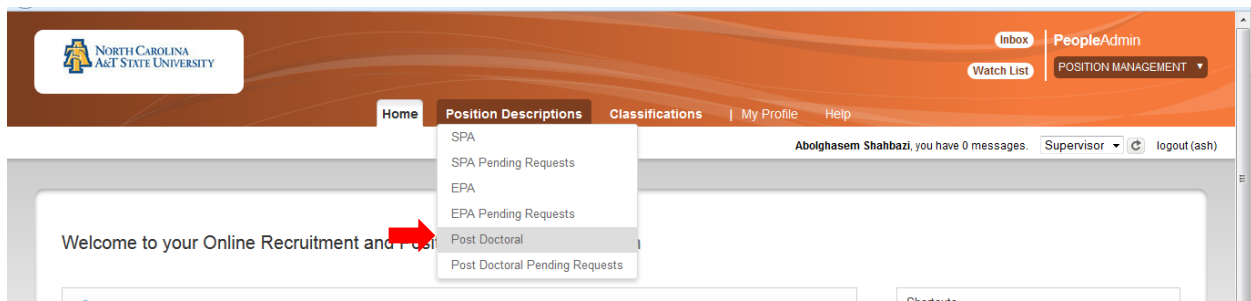
To initiate a Modify Position Description request for an Post Doctoral position, first switch to the Position Management module using the drop down menu located in the top right corner of the page:



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 "Post Doctoral":



You will then be taken to the **Position Descriptions** view, which provides a list of all position descriptions based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Positions that are direct reports to the Supervisor only.
Department Head	All positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	All positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

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, Department Head/Supervisor, or Dean/Vice Chancellor**

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

**List of position descriptions assigned to your user type and org group**

Ad hoc Search (3 Items Found) Save this search?

Working Position Title	Position Number	Employee First Name	Employee Last Name	Status	Department	Section/Unit	(Actions)
<a href="#">Post Doc Research Assoc</a>	009755	Shuangning	Xiu	Active	Bioenergy Center	Bioenergy Center	<a href="#">Actions</a>
<a href="#">Post Doc Research Assoc</a>	009775	Vishwanath	Deshmane	Active	Bioenergy Center	Bioenergy Center	<a href="#">Actions</a>
<a href="#">Post Doctoral Research Associate</a>	010000			Active	Bioenergy Center	Bioenergy Center	<a href="#">Actions</a>

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



Position Descriptions / Post Doctoral

## Post Doctoral Position Descriptions

Create New Position Description

Open Saved Search ▾ Search:  Search More search options

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 +

Ad hoc Search (3 Items Found) Save this search? Actions

<input type="checkbox"/>	Working Position Title	Position Number	Employee First Name	Employee Last Name	Status	Department	Section/Unit	(Actions)
<input type="checkbox"/>	Post Doc Research Assoc	009755	Shuangning	Xiu	Active	Bioenergy Center	Bioenergy Center	Actions ▾
<input type="checkbox"/>	Post Doc Research Assoc	009775	Vishwanath	Deshmane	Active	Bioenergy Center	Bioenergy Center	Actions ▾
<input type="checkbox"/>	Post Doctoral Research Associate	010000			Active	Bioenergy Center	Bioenergy Center	Actions ▾

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

Position Descriptions / Post Doctoral / Post Doctoral Research Associate

**Position Description: Post Doctoral Research Associate (Post Doctoral)**  
Current Status: Active  
Position Type: Post Doctoral  
Section/Unit: Bioenergy Center

Print Preview (Employee View)

Print Preview

★ View Supervisor

★ **Modify Position Description**

**Click here to initiate the request.**

Summary History

Classification

When you have documents from which to copy, and/or are familiar with the current purpose and duties of the position, click on “**Start**”:

Position Descriptions / Post Doctoral / Modify Position Description

### Start Modify Position Description Pending Request on Post Doctoral Research Associate?

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

**Start**

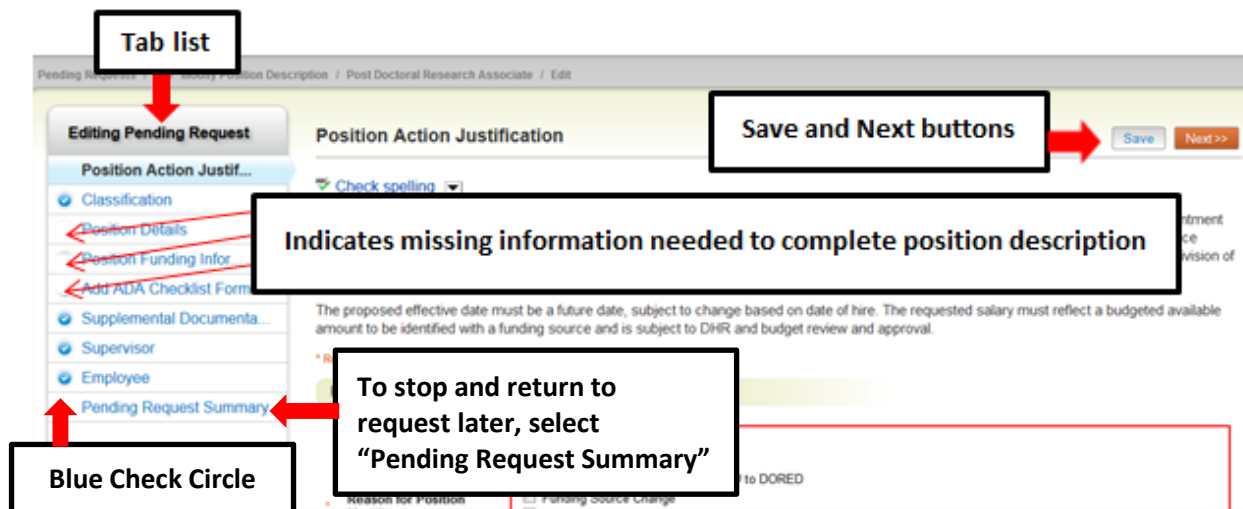
## Post Doctoral Modify - Edit Pending Request Page - General Navigation

After clicking on the “**Start**” button, you will then be taken into the **Position Action Justification** tab, the first information tab that must be completed before the Position Description can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Pending Request** menu in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the orange “**Next>>**” button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the “**Save**” button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column, however this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in red and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a Blue Check Circle will appear beside the tab. The Blue Check Circle also appears next to tabs that do not contain any required fields. (In this example, because the position had been previously approved, the required fields have been completed. It is important to remember to make the necessary revisions to all key fields in a modification action because in many cases, you will not receive “prompts” to update when a field is populated already).

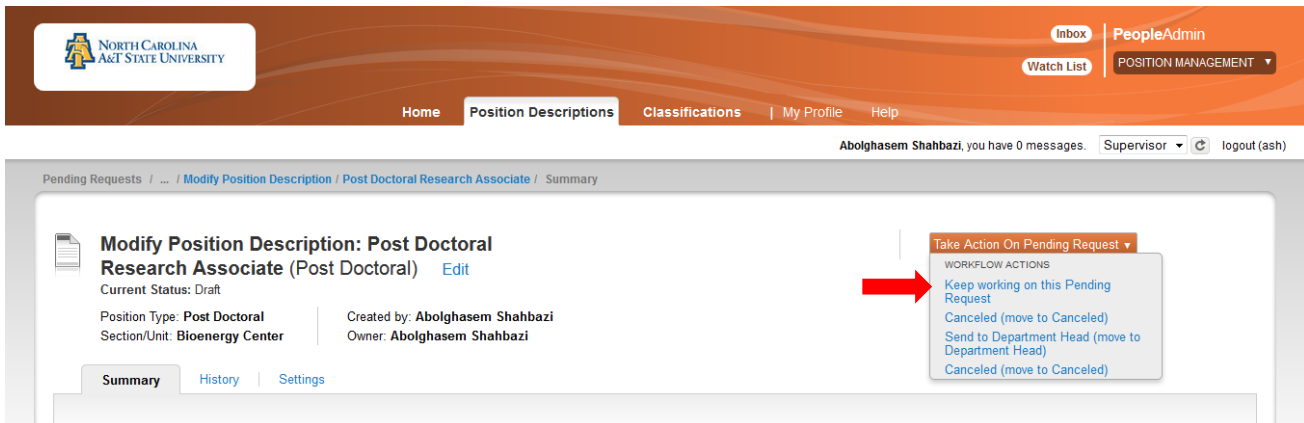
Required fields are highlighted in **red** and must be filled in before the Position Description can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields.



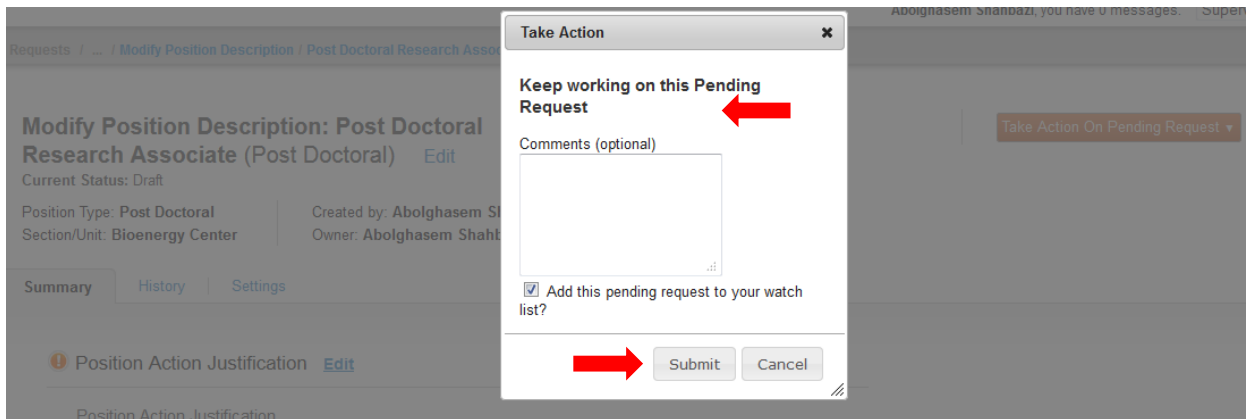
## Post Doctoral Modify - Saving to Return to a Pending Request Later

Also on the Editing Pending Request Tab List is an important menu item which should be selected if you need to stop a work session on the position description before submitting it to the next level for approval. Following these steps will ensure that all your work is saved when you open the request for completion.

- 1) Click the “Save” button located in either the top or bottom right corner
- 2) Select “Pending Request Summary” from the Tab List (illustrated above)
- 3) Select “Keep Working on this Pending Request”



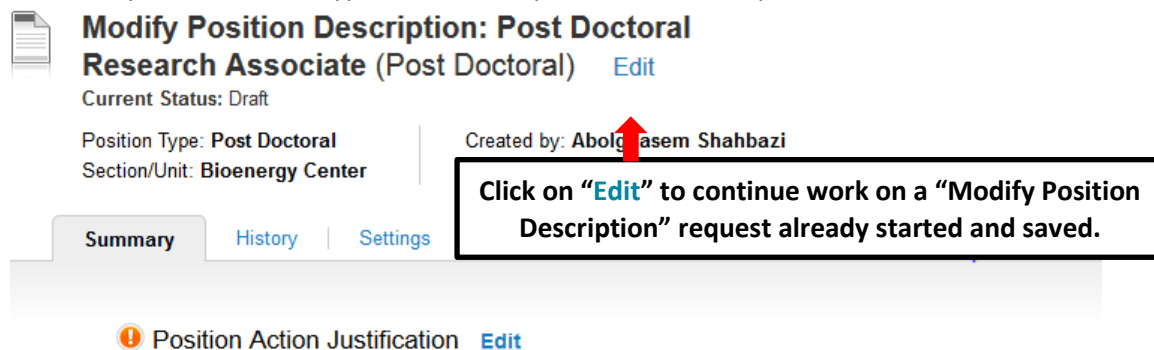
- 4) Add any Comments into the window that opens (illustrated below) as notes to yourself, if desired
- 5) Click “Submit”



The

**Pending Request** on this position description numbers can be located when you log into the Position Description module again as the same **User Type** you used to begin the action. Hover your cursor over the **Position Descriptions** tab and click on “SHRA Pending Requests.”

You will then return to the **Position Descriptions view**, which provides a list of all position descriptions based on your active user type, from which you can select this position number as before and continue.



## Post Doctoral Modify - Position Action Justification Tab

The “**Modify Position**” action in PeopleAdmin 7 allows for a variety of actions to be requested and completed. In the Post Doctoral classifications, “modify position” is used for reappointments, assigning additional duties, funding extensions and funding source changes. At least one option must be selected, but in some cases more than one option will be applicable (For example, if you are reappointing a post doc for a second year but need to change the funding source).

Pending Requests / ... / Modify Position Description / Post Doctoral Research Associate / Edit

**Editing Pending Request**

**Position Action Justification** Save Next>>

**Position Action Justif...**

- Classification
- Position Details
- Position Funding Infor...
- Add ADA Checklist Form
- Supplemental Documenta...
- Supervisor
- Employee
- Pending Request Summary

[Check spelling](#)

To request a post doctoral reappointment, the Principal Investigator (PI) must submit this action with (1) a copy of the Postdoctoral Reappointment Letter and (2) a copy of the Postdoctoral Scholar Annual Evaluation Form attached electronically to the Supplemental Documents tab. The Vice Chancellor for the Division of Research and Economic Development will initially approve any reappointment and forward the request to the Division of Human Resources.

The proposed effective date must be a future date, subject to change based on date of hire. The request amount to be identified with a funding source and is subject to DHR and budget review and approval.

**\* Required Information**

Position Action Justification

**Reason for Position Modification**

- ☐ Add Position Details for Posting
- ☐ Reappointment
- ☐ End Appointment, Return Position # to DORED
- ☐ Funding Source Change
- ☐ Reappointment Extension Exception (DORED Approved)
- ☐ Change Reporting Relationship (Supervisor or Organization)
- ☐ Abolish Position (DORED Function Only)

This field is required.

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

**Required fields highlighted in RED.**

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.

Remember that the funding source for a budgeted change in the position salary **must be identified** if you request an increase. Funding source details are entered on a later tab. As noted, any increase amount is subject to review and approval by the Division of Human Resources.

If you are requesting a reclassification, please enter the current classification in the designated field. Follow any other instructions; then click the orange “**Next>>**” button (located at both top and bottom right corners) to save changes and navigate to the next tab:

**Explanation of Requested Change**

Substantial growth in research projects and leadership; additional grant funding to support new projects.

**2. Describe why you are submitting the request.**

**Proposed Effective Date** 09/02/2013

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

**Basis for EPA Status**

Enter Research or Instructional

**DORED Position Number** 00444

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

**Requested Salary** 62000

Click on this link to review an NIH reference on Postdoctoral Salary Guidelines: [http://www.ncat.edu/hr/documents/post-doc/salary\\_guidelines.doc](http://www.ncat.edu/hr/documents/post-doc/salary_guidelines.doc)

**If applicable, % increase requested** 3%

**5. If requesting a budget/salary change, enter % of increase.**

**Position Request Number**

**“Save” and “Next>>” buttons.** Save Next>>

## Post Doctoral Modify - Classification Tab

A post doctoral reappointment does not change the position title/classification. To continue, click on **Next>>** at top right.

**Click Here to continue.**

Editing Pending Request

- Position Action Justif...
- Classification**
- Position Details

**Classification**

A post doctoral reappointment does not change the position title/classification. To continue, click on the orange "Next>>"

Selected Classification

Save << Prev Next >>

## Post Doctoral 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.

Follow the instructions at the top of the page, making sure to fill out all required fields highlighted in **RED**, and then click **Next>>** at top or bottom right of page to save changes and navigate to the next tab:

Editing Pending Request

- Position Action Justif...
- Classification
- Position Details**
- Position Funding Infor...
- Add ADA Checklist Form
- Supplemental Documenta...
- Supervisor
- Employee
- Pending Request Summary

**Position Details**

Save << Prev Next >>

Check spelling

Enter new data only into those fields which you are requesting to change by submitting this action.

\* Required Information

Contact Information

- \* Contact Name
- \* Contact Phone Number
- \* Contact Email
- \* Proxy (For Leave Reporting)
- \* Proxy Phone Number
- \* Proxy Email

Employee Information

- Employee First Name
- Employee Last Name
- Banner ID

Classification Information

- \* Position/Classification Title: Post Doc Research Associate
- Job Code: 81069
- EPA E-class: EN

Position Overview

- \* Primary Purpose of Position: To conduct fundamental research toward the development of advanced thermochemical biomass conversion technology for efficient and economic production of liquid transportation fuels and bio-based products.

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

Who is the proxy for leave reporting approvals?

Current Employee's Information will be loaded here, or position will show "Vacant."

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.

Primary Function of Organizational Unit

The Biological Engineering Program affiliated with the Department of Natural Resources (School of Agriculture & Environmental Sciences) and Department of Chemical, Biological and Bioengineering (College of Engineering) at North Carolina A&T State University is seeking a Postdoctoral Research Associate in the area of biomass gasification. This position will be supported by the NSF

**The Organizational Unit information should include factors such as department size and operating or grant budgets which are helpful to an analyst for determining a position's scope.**

Position Information

Working Position Title: Post Doctoral Research Associate

Position Number: 010000

Building and Room No.: Sockwell Hall, Room 107

Appointment Type: Time Limited - Full-time

**The appointment length must indicate the date the earliest fund supporting the position's budget (if there are multiple fund sources) ends.**

If Time Limited, Appointment Length: 06/30/2014

**The appointment type for post-doctoral is always time-limited**

Appointment Period: Initial Appointment - 1st year

**Edit the appointment period from the drop down menu.**

Current Budgeted Salary: \$60,000

## Post Doctoral Modify – Position Details Tab – Primary Responsibilities

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 a post doctoral position, at **least one** of the three categories of Instructional, Research, and Administrative must be selected to describe the primary responsibilities of the job. Entry of only one will meet the minimum requirement for a job description.

To enter or revise duties, click on the key button, **“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%:

Primary Responsibilities and Duties

Describe the major responsibilities and duties using the three categories of Instructional, Research, and Administrative. To enter duties please click the "Add Primary Responsibilities and Duties Entry" button. Repeat for each category relevant to job functions and SAVE after each category is added. **At least one entry is required** to complete a position description request

If the position requires duties in more than a single category, you will need to scroll and job duties. The total percentage of time allocated for all categories should equal 100%

**Link to sample Post Doc position description.**

A sample Post Doctoral Scholar position description is available for your reference at this link: [http://www.ncat.edu/hr/documents/post-doc/pd\\_job\\_description\\_template.doc](http://www.ncat.edu/hr/documents/post-doc/pd_job_description_template.doc). You may copy and paste wording from this template into the “Primary Responsibilities and Duties Entry.”

**Click to add the major responsibilities and duties - 1 entry is required.**

Add Primary Responsibilities and Duties Entry

A sample Post Doctoral Scholar position description is available at [doc/pd\\_job\\_description\\_template.doc](#). You may use this as a guide to complete the Primary Responsibilities Entry.

\* **Function** Research

**Describe the specific tasks and responsibilities related to the function.**

The successful candidate must be able to independently conduct research on one or more of the following subjects: (1) analysis of biomass gasification chemistry, (2) syngas cleaning technology, (3) computational fluid dynamics (CFD) modeling of fluidized bed gasification, (4) design and operation of fluidized bed gasifier, and (5) life cycle assessment of biomass gasification.

\* **Percentage of Time** 100%

☐ Remove Entry?

[Add Primary Responsibilities Entry](#)

Clicking the “Primary Responsibilities Entry” button opens this section to add or edit job duties.

Select to add or edit function from the drop down list.

Describe or revise specific tasks and responsibilities related to the function.

Indicate percentage of time spent performing tasks and responsibilities described.

## Post Doctoral Modify – Position Details – Compliance and Requirements

Completing the final position details fields identifies all required and preferred qualifications. After these details are added the first time, they will not usually need to be modified again.

**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.

Normal Work Schedule From [time] to [time] on [days of week] or expected office hours

\* **Department Required Skills** This field is required.

\* **Date Ph.D. Conferred** This field is required.  
A conferred Ph.D. degree awarded no more than 5 years prior to appointment is required for post doctoral employees.

\* **Preferred Years Experience, Skills, Training, Education** This field is required.

**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

Information from this section is used to populate the job posting when it is time to recruit.

A conferred Ph.D. degree awarded no more than 5 years prior to appointment is required for post doctoral employees.

Complete this page by clicking on [Save](#) and [Next>>](#)

[Save](#) [Previous](#) [Next >>](#)



## Post Doctoral Modify - Position Funding Information Tab

In the Funding Source Details section of this tab, you will indicate the funding source(s) for this position. Click on the **Add Funding Source Details Entry** button to enter budget and other required codes. **Select "Save" after each entry.** PLEASE NOTE: The annual amount budgeted must equal the requested salary.

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) **FTVORG**- 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.

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. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **"Next>>"** to move to the next tab:

**IMPORTANT NOTE:** Remember to click "Save" after each funding source is entered.

Position Funding Information

\* Required Information

Funding Source Details

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source.

[Add Funding Source Details Entry](#)

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.

State Appropriated Funding / Non-State Appropriated Funding: Please select

If non-state, select source of funding: Please select

Additional funding source information

If "Other" selected above, designate source. Provide position number if funds are being transferred from another position. Attach Budget Revision Form as Supplemental Document if necessary to transfer funds.

Is this position partially or fully funded on ARRA stimulus monies?

Budget Code: Please select

Fund: Format: 6 digit number #####

Org: Format: 5 digit number #####

Account: Format: 5 digit number #####

Program: Format: 3 digit number ###

Date Funds End

Annual Amount

Percentage of FTE

☐ Remove Entry?

[Add Funding Source Details Entry](#)

Select State or Non-State from drop down list.

If Non-State, select funding source from drop down list.

Coordinate with DORED on funding source information.

Enter date funds end (if time-limited), annual amount, and percentage of FTE.

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

## Post Doctoral Modify - Add ADA Checklist Form Tab

The ADA checklist is used to determine the general physical requirements, physical activities, visual acuity, and working conditions of positions in order to be compliant with the provisions of the Americans with Disabilities Act of 1990.

Check each box that corresponds with the physical aspects of the essential functions of the position, then click **"Next>>"** to move to the next tab. All 4 fields are required and include:

- The physical activity of the position (Check all that apply and at least one)
- The physical requirements of the position (Select one from the drop down list)
- The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)
- The condition the worker will be subject to in the position (Check all that apply and at least one)

**\* Required Information**

ADA Compliance Information

The physical activity of this position (Check all that apply and at least one)

- ☐ Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles and the like, using feet and legs and/or hands and arms. Body agility is emphasized. This factor is important if the amount and kind of climbing required exceeds that required for ordinary locomotion.
- ☐ Balancing: Maintaining body equilibrium to prevent falling when walking, standing or crouching on narrow, slippery or erratically moving surfaces. This factor is important if the amount and kind of balancing exceeds that needed for ordinary locomotion.
- ☐ Stopping: Bending body downward and forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
- ☐ Kneeling: Bending legs at knee to come to a rest on knee or knees.
- ☐ Crouching: Bending the body downward and forward by bending leg and spine.
- ☐ Crawling: Moving about on hands and feet.
- ☐ Reaching: Extending hand(s) and arm(s) in any direction.
- ☐ Standing: Particularly for sustained periods of time.
- ☐ Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another.
- ☐ Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward or outward.
- ☐ Pulling: Using upper extremities to exert force in order to draw, drag, haul or tug objects in a sustained motion.
- ☐ Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position-to-position. This factor is important if it occurs to a considerable degree and requires the substantial use of the upper extremities and back muscles.
- ☐ Fingering: Picking, pinching, typing or otherwise working, primarily with fingers rather than with the whole hand or arm as in handling.
- ☐ Grasping: Applying pressure to an object with the fingers and palm.
- ☐ Feeling: Perceiving attributes of objects, such as size, shape, temperature or texture by touching with skin, particularly that of finger tips.
- ☐ Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
- ☐ Hearing: Perceiving the nature of sounds at normal speaking levels with or without correction. Ability to receive detailed information through oral communication, and to make fine discrimination in sound.
- ☐ Repetitive motions: Substantial movements (motions) of the wrists, hands, and/or fingers.

This field is required.

The physical requirements of this position (Select One)

Please select ▼ This field is required.

Select one from the drop down list.

The visual activity requirements including color, depth perception, and field of vision (Check all that apply and at least one)

- ☐ The worker is required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; extensive reading; visual inspection involving small defects, small parts, and/or op.
- ☐ The worker is required to have visual acuity to perform an activity such as: operates machines such as lathes, drill presses, power saws and mills where the seeing job is at or within arm's reach; performs mechanical or skilled trades tasks of a non-re.
- ☐ The worker is required to have visual acuity to operate motor vehicles or heavy equipment.
- ☐ The worker is required to have visual acuity to determine the accuracy, neatness, and thoroughness of the work assigned (i.e., custodial, food services, general laborer, etc.) or to make general observations of facilities or structures.

This field is required.

The condition the worker will be subject to in this position (Check all that apply and at least one)

- ☐ The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes.
- ☐ The worker is subject to outside environmental conditions: No effective protection from the weather.
- ☐ The worker is subject to both environmental conditions: Activities occur inside and outside.
- ☐ The worker is subject to extreme cold: Temperatures typically below 32 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind or humidity.
- ☐ The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.
- ☐ The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the ambient noise level.
- ☐ The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.
- ☐ The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, exposure to high heat or exposure to chemicals.
- ☐ The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system of the skin. Fumes, odors, dusts, mists, gases or poor ventilation.
- ☐ The worker is subject to oils: There is air and/or skin exposure to oils and other cutting fluids.
- ☐ The worker is required to wear respirator.
- ☐ The worker frequently is in close quarters, crawl space, shafts, man holes, small enclosed rooms, small sewage and water line pipes, and other areas which could cause claustrophobia.
- ☐ The worker is required to function in narrow aisles or passage ways.
- ☐ The worker is exposed to infectious diseases.
- ☐ The worker is required to function around prisoners or mental patients.
- ☐ None: The worker is not substantially exposed to adverse environmental conditions (such as in typical office or administrative work).

This field is required.

Save << Prev Next >>

## Post Doctoral Modify - Supplemental Documentation Tab

The **Supplemental Documentation 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:

For Post Doctoral Reappointments only, (when modifying a post doctoral appointment), the Postdoctoral Scholar Annual Evaluation Form is required as an attachment. A copy of the Post Doctoral Reappointment Letter should also be attached as "Other Document." Links to the form and a template reappointment letter are below. Complete the form or letter, save it, and select "Upload New" as the option under Actions.

Evaluation form: [http://www.ncat.edu/hr/documents/post-doc/postdoctoral\\_evaluation\\_form.doc](http://www.ncat.edu/hr/documents/post-doc/postdoctoral_evaluation_form.doc)

Reappointment Letter: [http://www.ncat.edu/hr/documents/post-doc/pd\\_employment\\_reappt\\_offer\\_ltr\\_template.doc](http://www.ncat.edu/hr/documents/post-doc/pd_employment_reappt_offer_ltr_template.doc)

Pending Requests / ... / Modify Position Description / Post Doctoral Research Associate / Edit

**Editing Pending Request**

- Position Action Justif...
- Classification
- Position Details
- Position Funding Infor...
- Add ADA Checklist Form
- Supplemental Documenta...**
- Supervisor
- Employee
- Pending Request Summary

**Supplemental Documentation** [Save] [<< Prev] [Next >>]

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.

For Post Doctoral Reappointments only, (when modifying a post doctoral appointment), the Postdoctoral Scholar Annual Evaluation Form is required as an attachment. A copy of the Post Doctoral Reappointment Letter should also be attached as "Other Document." Links to the form and a template reappointment letter are below. Complete the form or letter, save it, and select "Upload New" as the option under Actions.

Evaluation form: [http://www.ncat.edu/hr/documents/post-doc/postdoctoral\\_evaluation\\_form.doc](http://www.ncat.edu/hr/documents/post-doc/postdoctoral_evaluation_form.doc)  
Reappointment Letter: [http://www.ncat.edu/hr/documents/post-doc/pd\\_employment\\_reappt\\_offer\\_ltr\\_template.doc](http://www.ncat.edu/hr/documents/post-doc/pd_employment_reappt_offer_ltr_template.doc)

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 Choose Existing Add by URL
Other Document			
Post Doctoral Evaluation			

Click "Actions", then select Upload New, Create New, Choose Existing, or Add by URL in order to upload an attachment.

Attach a saved copy of the Post Doctoral Evaluation form when submitting a reappointment

## Post Doctoral Modify - Supervisor Tab

The **Supervisor Tab** allows you to select the position to which your new position will report. If you are not editing from an existing position, use **"Filter these results"** to search all supervisors by a key word.

**PLEASE NOTE:** The selection list of supervisors is dependent on the POSITION TYPE (SHRA, EHRA, or Post Doctoral) being created. To select a supervisor in a different Position Type (for example EHRA supervising Post Doctoral), click on **"Filter these results"** and select the **Position Type ( EHRA)** to which the supervisor of the position belongs. Then click on "Search" to access the list EHRA supervisors.

To view one of the position descriptions in the list, click on the **"Actions"** link next to the classification title you want to view and select **"View"**, or click on the **Working Position Title**. To return from the summary, use the Back button located on the top left corner of your web browser. To **select** a position description to which your new position will report and proceed with creating the position description, click on the **Radio Button** to the left of the position description you want to select, then and click on the orange **Next>>** button located on both the top and bottom right-hand corners of the page.

**REMEMBER:** The positions that appear in this list are based on your active user type and the org unit to which you are assigned. (Supervisor, Department Head, Dean / Vice Chancellor):

This screenshot shows the 'Supervisor' tab in the 'Post Doctoral Research Associate' position description. The interface includes a top navigation bar with 'Home', 'Position Descriptions', 'Classifications', and 'My Profile'. A left sidebar lists 'Editing Pending Request' options: 'Position Action Justif...', 'Classification', and 'Supervisor'. The main content area shows a table of 'Position Descriptions' with columns for 'Working Position Title' and 'Position Description Title'. A 'Filter these results' link is present. Annotations with red arrows point to specific elements: 'Navigate to the previous tab by clicking on the "<<Prev" button.' points to the '<< Prev' button; 'Search all position descriptions by clicking on "Filter these results".' points to the 'Filter these results' link; 'Click the radio button next to the position description you want to select, then click "Next>>".' points to the radio button and the 'Next >>' button; 'View the position descriptions summary by clicking on "Actions", then "View" or by clicking on the title.' points to the 'Actions' link and the 'Post Doc Research Associate' title.

This screenshot shows the 'Search Position Descriptions' dialog box. It has a search bar and a dropdown menu for 'Position Type'. The dropdown is open, showing options: 'Post Doctoral', 'SPA', 'EPA', and 'Post Doctoral'. An annotation with a red arrow points to the 'EPA' option, stating: 'Select EHRA as Position Type under "Filter These Results" if a different supervisor needs to be assigned'. The dialog also includes fields for 'Department', 'First Name', and 'Last Name', and 'Search' and 'Cancel' buttons.

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

The screenshot shows the 'Modify Position Description: Post Doctoral Research Associate' page. The 'Summary' tab is selected, and a 'Blue Circle Check' icon is visible next to the 'Position Action Justification' tab. A red arrow points to the 'Edit' link next to the 'Position Action Justification' tab. A text box says 'Click "Edit" to make edits to a tab.' Another text box says 'Blue Circle Check'.

Field	Value
Position Type	Post Doctoral
Section/Unit	Bioenergy Center
Created by	Abolghasem Shahbazi
Owner	Abolghasem Shahbazi
Position Action Justification	Test
Proposed Effective Date	08/31/2013
Basis for EPA Status	Test

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:

The screenshot shows the 'Position Details' tab. An 'Orange Circle Exclamation Point' icon is visible next to the 'Position Details' tab. A red arrow points to the 'Edit' link next to the 'Position Details' tab. A text box says 'Click "Edit" to make edits to a tab.' Another text box says 'Orange Circle Exclamation Point'.

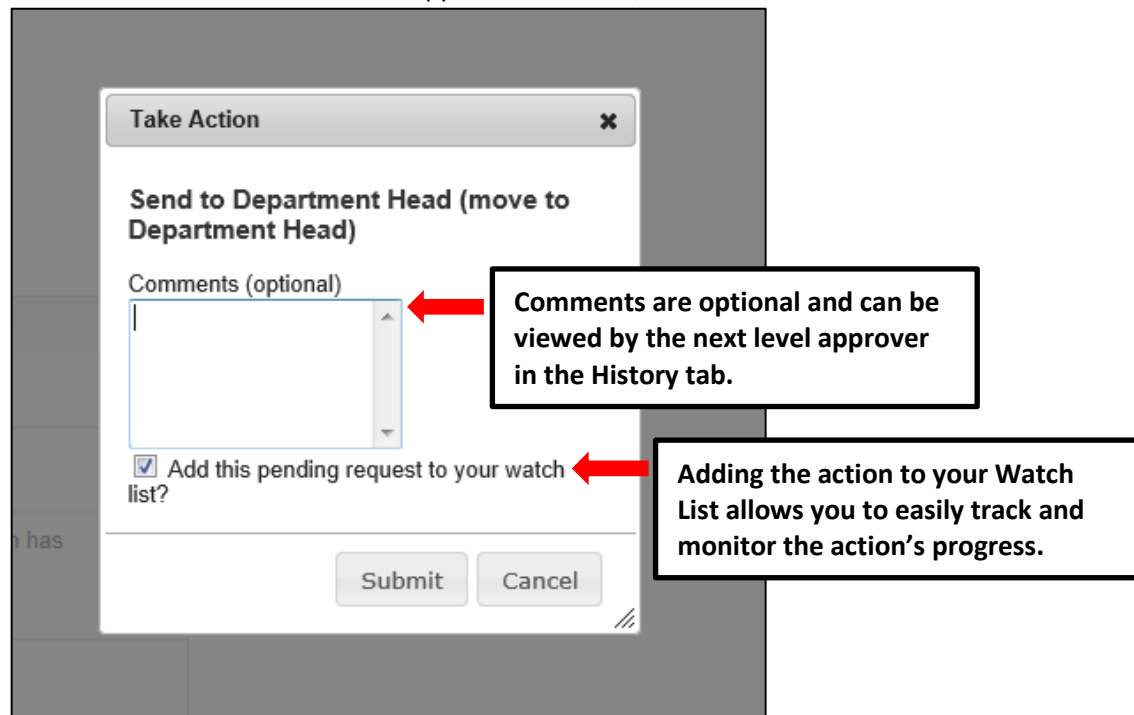
Field	Value
Position Name	
Contact Phone Number	
Contact Email	
Proxy (For Leave Reporting)	
Proxy Phone Number	

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)"**:

The screenshot shows the 'Take Action On Pending Request' dropdown menu. A red arrow points to the 'Take Action On Pending Request' button. A text box says 'Click on "Take Action on Pending Request", then select "Send to Department Head" to move the request to the next step in the approval workflow.' The dropdown menu shows the following options:

- Keep working on this Pending Request
- Canceled (move to Canceled)
- Send to Department Head (move to Department Head)
- Canceled (move to Canceled)

You will then see the following **“Take Action”** box. You can enter comments in the **“Comments (optional)”** field that will be viewable in the History tab 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:



The screenshot shows a 'Take Action' dialog box with a close button (X) in the top right corner. The main heading is 'Send to Department Head (move to Department Head)'. Below this is a text area labeled 'Comments (optional)'. A red arrow points from a text box to this area. Below the text area is a checkbox labeled 'Add this pending request to your watch list?'. A red arrow points from another text box to this checkbox. At the bottom are 'Submit' and 'Cancel' buttons.

**Take Action** [X]

**Send to Department Head (move to Department Head)**

Comments (optional)

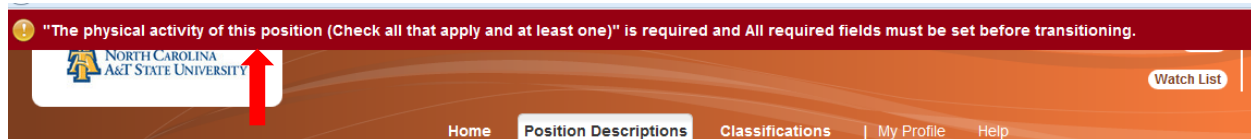
☒ Add this pending request to your watch list?

Submit Cancel

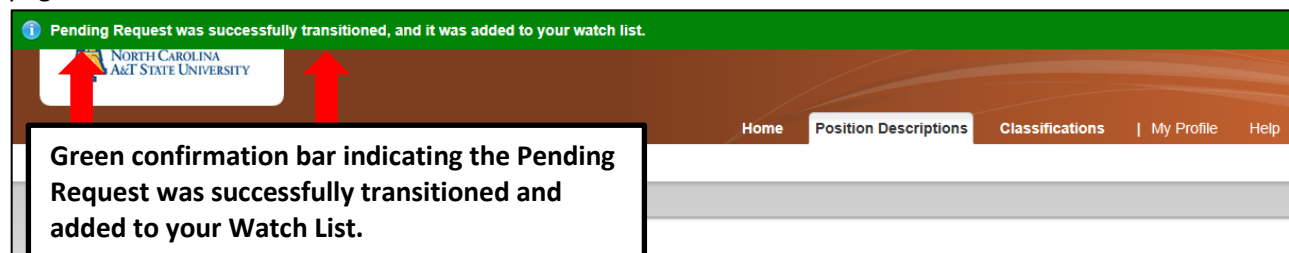
Comments are optional and can be viewed by the next level approver in the History tab.

Adding the action to your Watch List allows you to easily track and monitor the action’s progress.

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation



Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:



The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).



## Section 3: Applicant Tracking

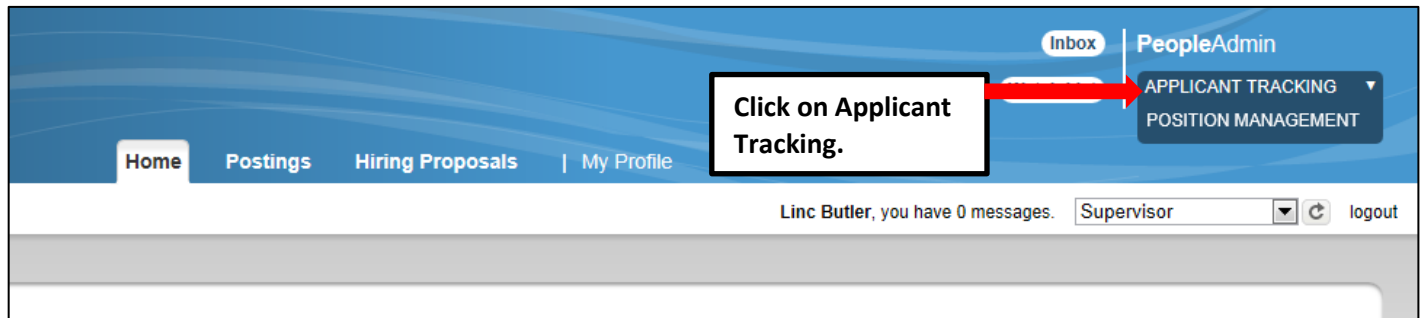
The Applicant Tracking module provides online access to job postings and applicant information, and allows for managers and supervisors to initiate requests to post permanent SHRA, EHRA, and Post Doc positions for recruitment and initiate hiring proposals. The specific requests and actions that can be initiated in the Applicant Tracking module are:

- Create New Posting
- Review and Ranking of Applicants
- Initiate Hiring Proposal

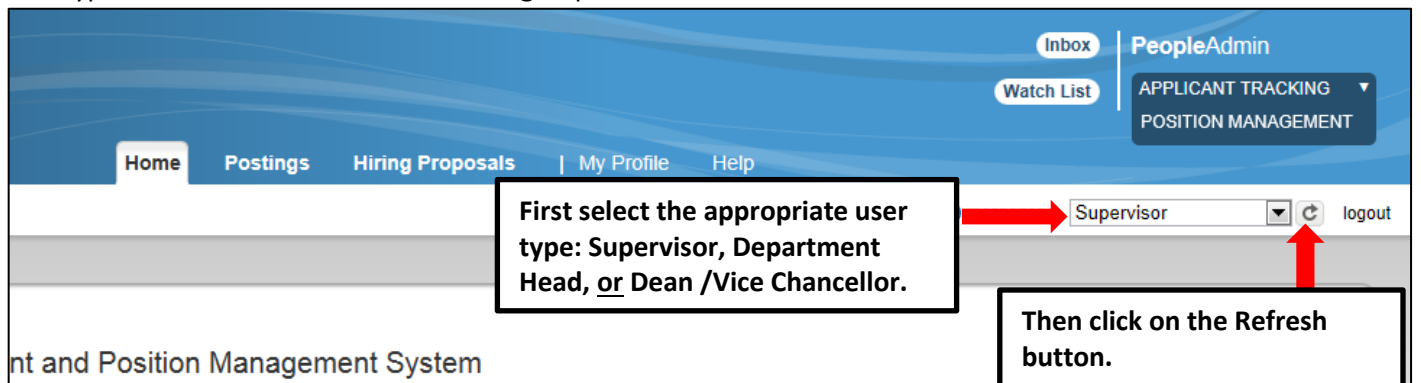
The only user types that can initiate a **Create New Posting** or a **Hiring Proposal** request are Supervisor, Department Head, and Dean/Vice Chancellor. The only user types that can review and rank applicants are Supervisor, Department Head, Dean/Vice Chancellor, Applicant Reviewer, or Search Committee Member.

### Create New Posting – General Navigation

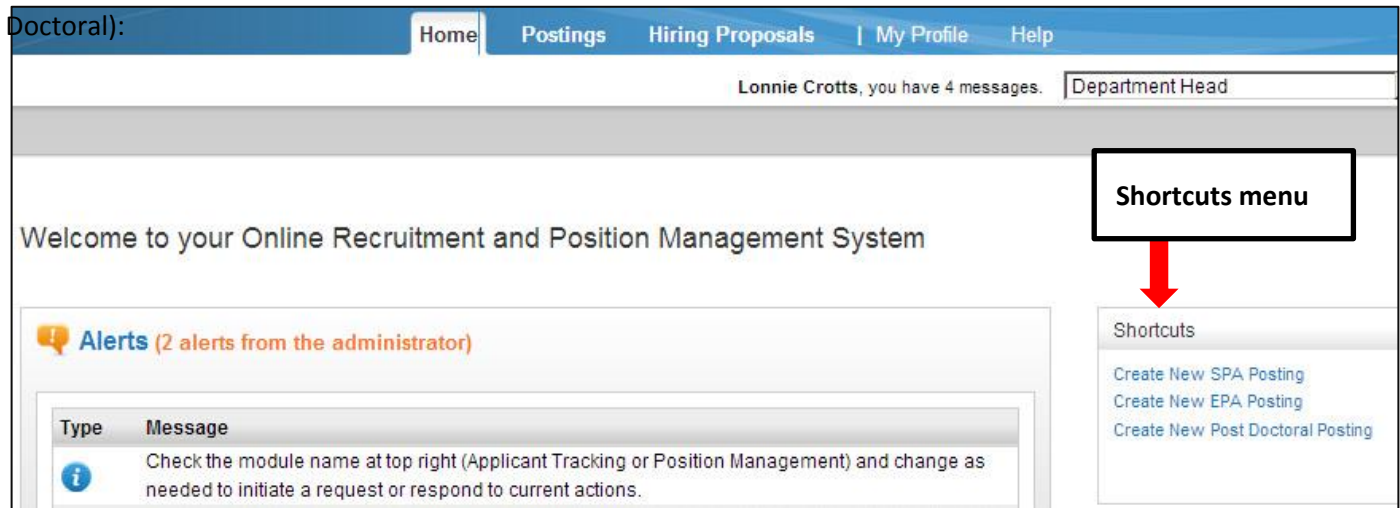
To initiate a **Create New Posting** request, first switch to the **Applicant Tracking** module using the drop down menu located in the top right corner of the page:



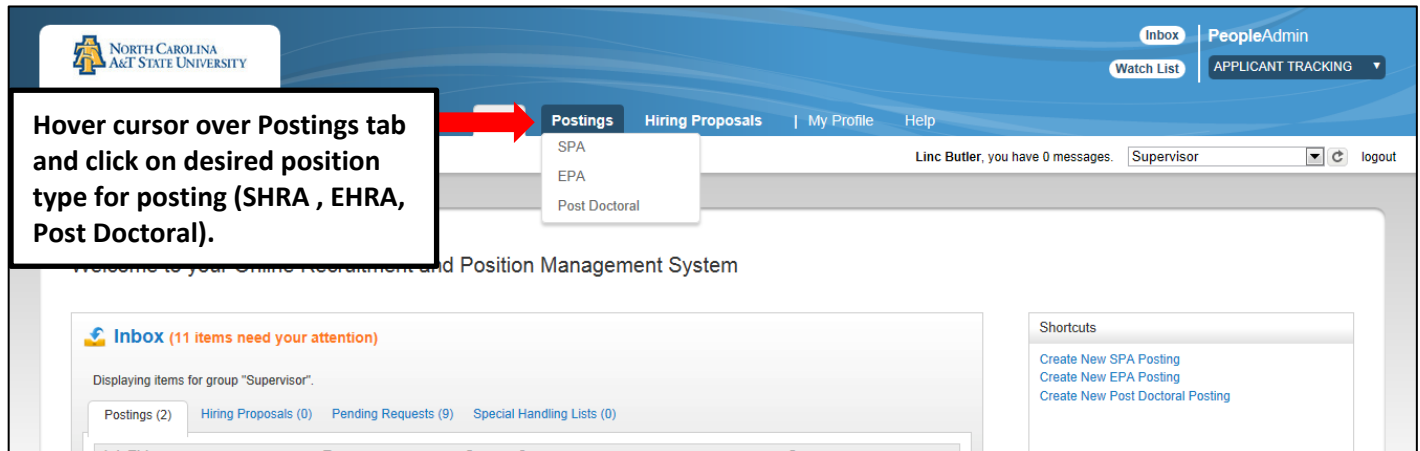
Once in the **Applicant Tracking** module (header at the top of the screen will be **Blue**), make sure you have the necessary active user type. **Remember:** only Supervisor, Department Head, and Dean/Vice Chancellor user types can initiate a **Create New Posting** request:



Once in the correct user type, you can initiate a **Create New Posting** request by clicking on the appropriate link in the Shortcuts menu for the desired position type for posting (SHRA, EHRA, or Post-Doctoral):

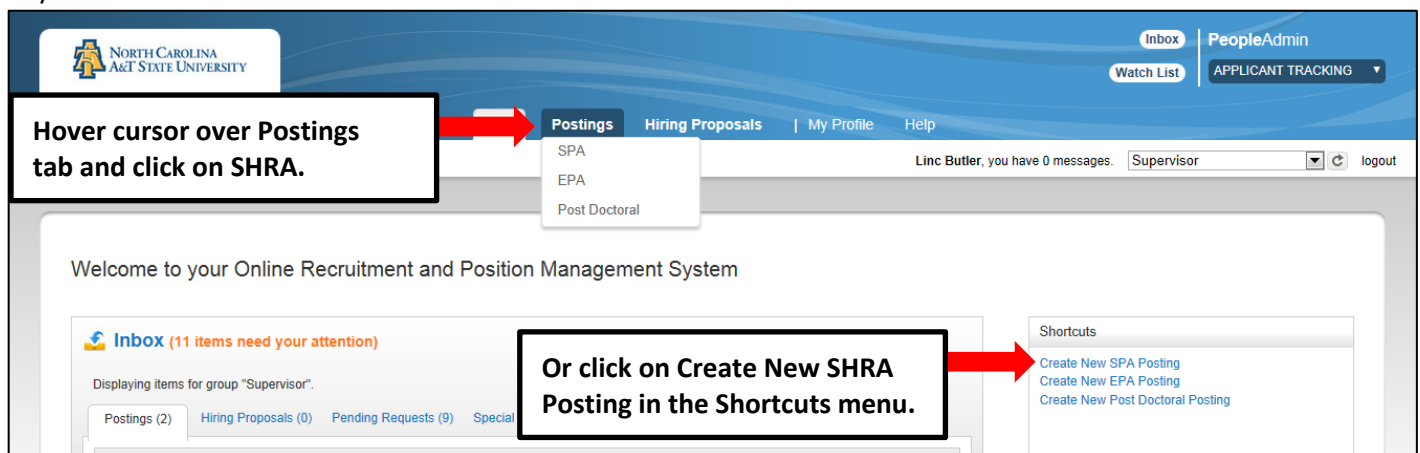


You can also initiate a **Create New Posting** request by hovering your cursor over the **Postings** tab and clicking on the desired position type for posting:



## Create New SHRA Posting

To initiate a **Create New SHRA Posting** request, hover your cursor over the **Postings** tab and click on the "SHRA", or click on the **Create New SHRA Posting** link located in the **Shortcuts** menu to the right of your **Inbox**:



You will then be taken to the **SHRA Postings** view, which provides a list of all current/pending SHRA postings initiated based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Current / pending postings for positions that are direct reports to the Supervisor only.
Department Head	Current / pending postings for all positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	Current / pending postings for all positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

In the **SHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later:

**Active user type is Supervisor.**

**List of current / pending SHRA postings by active user type.**

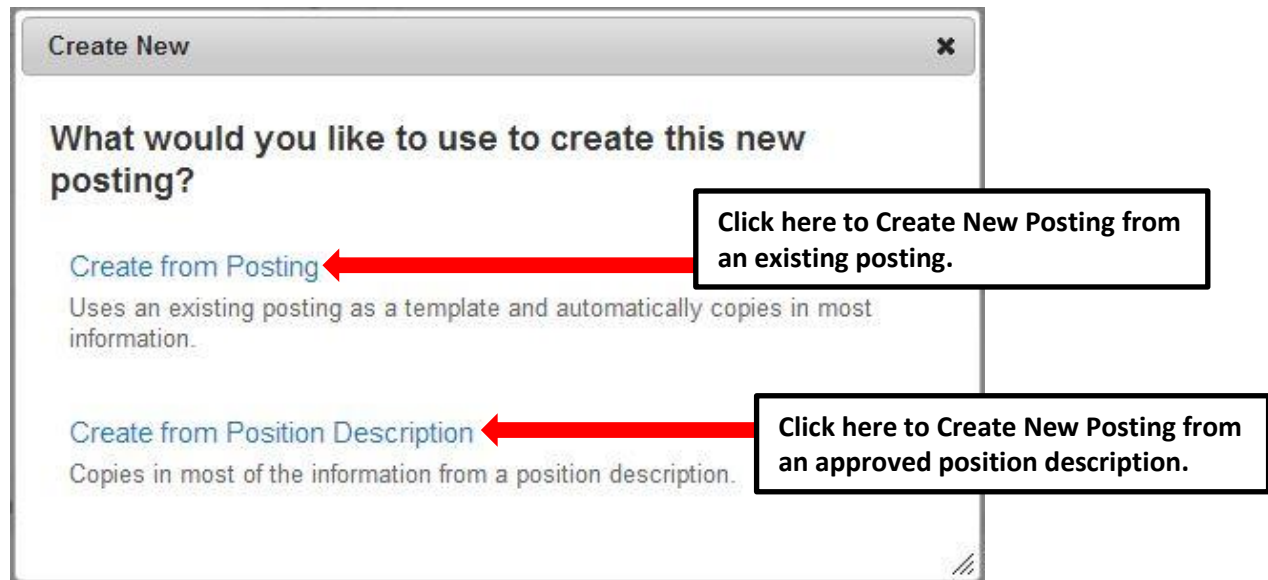
**Searches are customizable by position attributes and can be saved for later use.**

Working Title	Posting Number	Position Number	Department	Active Applications	Workflow State	Last Updated	Actions
<input type="checkbox"/> Employee Relations Counselor (TLB8)	SPA035	TLB8	Employee Relations	1	Closed	August 01, 2013 at 03:03 pm	Actions
<input type="checkbox"/> Employee Relations Counselor (TLB7)	SPA034	TLB7	Employee Relations	1	Closed	August 01, 2013 at 10:21 am	Actions
<input type="checkbox"/> Employee Relations Counselor (TLB7B)	SPA032	TLB7B	Employee Relations	10	Closed	August 01, 2013 at 09:33 am	Actions
<input type="checkbox"/> Administrative Support Assoc	SPA018	001111	Classification & Compensation	1	Closed	July 31, 2013 at 12:52 pm	Actions
<input type="checkbox"/> Employee Relations Counselor (TLB6)	SPA028	TLB6	Employee Relations	10	Closed	July 31, 2013 at 10:58 am	Actions
<input type="checkbox"/> Administrative Support Assoc	SPA027	000051	Classification & Compensation	1	Closed	July 31, 2013 at 09:15 am	Actions
<input type="checkbox"/> Employee Relations Counselor (TLB5)	SPA022	TLB5	Employee Relations	1	Closed	July 30, 2013 at 03:42 pm	Actions
<input type="checkbox"/> Employee Relations Counselor (TLB4)	SPA021	TLB4	Employee Relations	1	Closed	July 30, 2013 at 11:09 am	Actions
<input type="checkbox"/> Employee Relations Counselor (TLB3)	SPA017	TLB3	Employee Relations	0	Closed	July 29, 2013 at 03:08 pm	Actions
<input type="checkbox"/> Administrative Support Assoc	SPA016	001111	Classification & Compensation	0	Closed	July 29, 2013 at 01:47 pm	Actions
<input type="checkbox"/> Employee Relations Counselor (TLB2)	SPA013	10000	Employee Relations	2	Closed	July 29, 2013 at 11:28 am	Actions

To initiate the request, click on the orange **Create New Position Description** button located on the top right of the screen just below the grey bar:

**Click here to initiate a Create New Posting request.**

You will then see the **Create New** menu, asking what you would like to use to create the new posting:

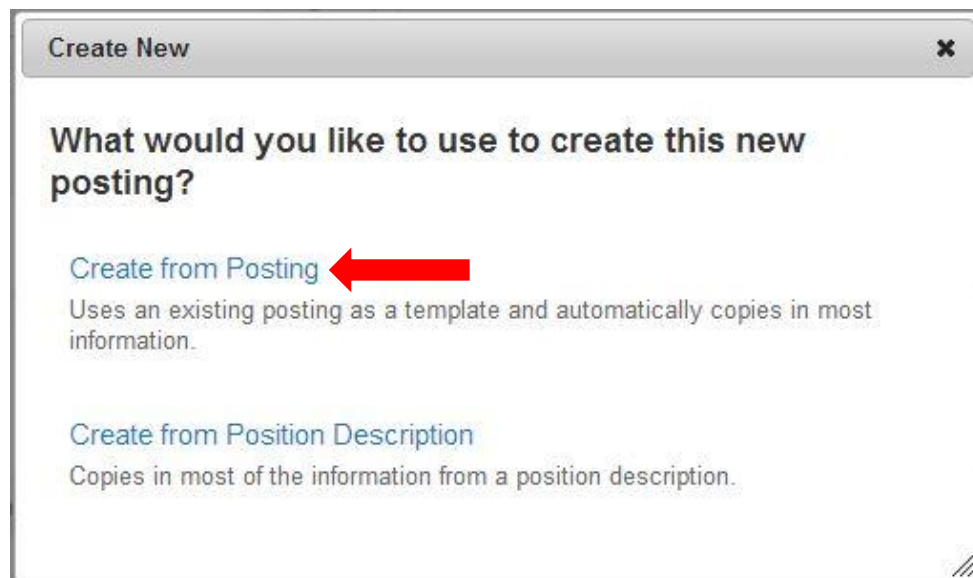


### [Create New SHRA Posting – Create from Posting](#)

Select **Create from Posting** if you have previously posted a position in the PeopleAdmin system and wish to post a position using the same or similar information from that prior posting.

**PLEASE NOTE:** If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Posting** option copies information from an existing posting into a new posting:



After clicking on **Create from Posting**, you will be taken to the **SHRA Position Descriptions** view, where you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later. If you need assistance in finding the desired posting, please contact a Recruitment Coordinator in the Division of Human Resources:

The screenshot shows the SHRA Position Descriptions view. Annotations include:

- Active user type is Supervisor.** (Points to the Supervisor dropdown menu in the top right.)
- List of current / pending SHRA postings by active user type.** (Points to the table of postings.)
- Searches are customizable by position attributes and can be saved for later use.** (Points to the search bar and 'More search options' link.)
- Actions drop down menu.** (Points to the 'Actions' dropdown menu in the table header.)

Working Title	Posting Number	Position Number	Department	Active Applications	Workflow State	Last Updated	(Actions)
Employee Relations Counselor (TLB8)	SPA035	TLB8	Employee Relations	1	Closed	August 01, 2013 at 03:03 pm	Actions
Employee Relations Counselor (TLB7)	SPA034	TLB7	Employee Relations	1	Closed	August 01, 2013 at 10:21 am	Actions
Employee Relations Counselor (TLB7B)	SPA032	TLB7B	Employee Relations	10	Closed	August 01, 2013 at 09:33 am	Actions
Administrative Support Assoc	SPA018	001111	Classification & Compensation	1	Closed	July 31, 2013 at 12:52 pm	Actions
Employee Relations Counselor (TLB6)	SPA028	TLB6	Employee Relations	10	Closed	July 31, 2013 at 10:58 am	Actions
Administrative Support Assoc	SPA027	000051	Classification & Compensation	1	Closed	July 31, 2013 at 09:15 am	Actions
Employee Relations Counselor (TLB5)	SPA022	TLB5	Employee Relations	1	Closed	July 30, 2013 at 03:42 pm	Actions
Employee Relations Counselor (TLB4)	SPA021	TLB4	Employee Relations	1	Closed	July 30, 2013 at 11:09 am	Actions
Employee Relations Counselor (TLB3)	SPA017	TLB3	Employee Relations	0	Closed	July 29, 2013 at 03:08 pm	Actions
Administrative Support Assoc	SPA016	001111	Classification & Compensation	0	Closed	July 29, 2013 at 01:47 pm	Actions
Employee Relations Counselor (TLB2)	SPA013	10000	Employee Relations	2	Closed	July 29, 2013 at 11:28 am	Actions

Once you locate the posting you wish to create from, you can select it by moving your cursor over that posting's corresponding **Actions** drop down menu located in the far right column and clicking on **Create From**. This drop down menu will also give you the option of **View Posting** if you wish to view the information associated with a particular posting prior to selecting **Create From**:

The close-up shows the 'Actions' dropdown menu with two options: 'View' and 'Create From'. A red arrow points from a box labeled 'Click here' to the 'Create From' option.

By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange **Create New Posting** button to begin updating posting information:

This screenshot shows the 'New Posting' form. Annotations include:

- Create new posting button.** Points to the 'Create New Posting' button at the top right.
- Confirm Organizational Unit information.** Points to the 'Organizational Unit' section, which includes fields for 'Division/School/College', 'Department', and 'Section/Unit', all currently set to 'VC for Human Resources'.
- Include special offline application instructions if necessary.** Points to the 'Special offline application instructions' text area.
- Create new posting button.** Points to the 'Create New Posting' button at the bottom right.

## Create New SHRA Posting from an Existing Posting – Create from Posting

After clicking on the “**Create New Posting**” button, you will then be taken to the **Posting Details** tab, the first information tab that must be completed before the new **SHRA Posting** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Posting** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all others will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the **Next>>** button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the “**Save**” button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the new **SHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields.

This screenshot shows the 'Posting Details' form. Annotations include:

- Tab list** points to the left-hand navigation menu.
- Blue Check Circle** points to the checkmark icon next to the 'Posting Details' tab in the left-hand menu.
- Save and Next buttons.** Points to the 'Save' and 'Next >>' buttons at the top right.

The form displays the following information:

Position/Classification Title	Human Resources Specialist
Job Code	11804
Classification Type	SPA



## Create New SHRA Posting from an Existing Posting – Posting Details Tab

Since you are creating a new **SHRA Posting** from an existing one, many of the fields will already be filled in with information copied from the existing posting. Follow the instructions at the top of the page to complete any remaining required fields, then click the **Next >>** button to save changes and navigate to the next tab:

**Save and Next buttons.**

**Fields from the existing posting will be copied in to your new posting.**

**Enter a hiring range if desired.**

**Enter preferred years of experience, skills, training and education.**

**Click to view Competency Profile.**

**Position Overview**

Primary Purpose of Position	Test
Primary Function of Organizational Unit	Test
Work Hours: From [time] to [time] on [days of week]	M-f 8-5pm

**Key Responsibilities and Related Competencies**

Required Competency	Applied Knowledge - HR Program and Organization
Description	Performs X, Y, and Z.
Required Competency	Customer Service
Description	Performs A, B, and C.
Required Competency	Communication - Verbal/Written
Description	Performs H.

**Continue to enter posting information into any empty fields as needed.**

Position Information	
* Working Title	<input type="text" value="Employee Relations Counselor (TLB10)"/>
Competency Level	Journey
Position Number	TLB10
* JCAT	12345
Approved Salary	\$45,000
* Salary Grade Equivalent	
* FLSA	Exempt
* Appointment Type	Permanent - Full-time
FTE	
If Time Limited, Appointment Length	<input type="text"/>

*If time limited, please indicate budget end date. If funded from more than one fund, indicate earliest end date. This field cannot be left blank if the "Time Limited" field above is checked selected.*

**Continue to enter posting information into any empty fields as needed.**

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Close Date**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for SHRA positions is five (5) calendar days. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff. For SHRA positions, the appropriate **Fast Find** selection is "Staff":

Posting Detail Information	
* Supervisor	<input type="text" value="Select Some Options"/> This field is required.
* Applicant Reviewer	<input type="text" value="Select Some Options"/> This field is required.
Posting Number	
* Open Date	<input type="text"/> This field is required.
* Close Date	<input type="text"/> This field is required.
Special Instructions to Applicant	<div style="border: 1px solid #ccc; height: 100px;"></div>
* Fast Find Information	<input type="text" value="Please select"/> This field is required.

**Supervisor and / or Applicant Reviewer access to the posting.**

**Minimum allowable posting period is five (5) calendar days.**

**Select the most appropriate Fast Find category for the posting.**

Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the **Next >>** button to save your changes and move to the next tab. You can also click the “Save” button if you wish to save your changes and keep working on the current tab.

**Advertising Summary**

Please list additional external advertising sources if different than standard advertising sources.

Standard sources include: NC Employment Security Commission & UNC General Administration

**Pass Message**

Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.

**Fail Message**

Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.

**Save and Next buttons.**

**Save** **Next >>**

## Create New SHRA Posting from an Existing Posting – Position Funding Information Tab

In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by the University’s Budget Advisory Committee:

Postings / SPA / Employee Relations Counselor (TLB10) (Draft) / Edit: Position Funding Information

**Editing Posting**

- Posting Details
- Position Funding Information**
- Supplemental Questions
- Applicant Documents
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

**Position Funding Information**

**Budget Advisory Approval**

All recruitment of permanent EPA and SPA positions that are funded in whole or in part by general state funds requires approval by the University’s Budget Advisory Committee. To receive consideration of the Committee’s review process, state what mission specific, essential, and / or key objectives will not be met if the position is not filled.

Mission Specific, Essential and/or Key Objectives not Met without position

**State what mission specific, essential, and/or key objectives will not be met if position is not filled.**

**Save** **<< Prev** **Next >>**

Funding Source information from prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

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.

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. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **Next >>** to move to the next tab:

**Funding Source Details**

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.

* State Appropriated Funding / Non-State Appropriated Funding	State Appropriated Funding
If non-state, select source of funding	Please select
If other, designate source	
* Budget Code	16070 (State)
* Fund	111111 <small>Format: 6 digit number #####</small>
* Org	11111 <small>Format: 5 digit number #####</small>
* Account	11111 <small>Format: 5 digit number #####</small>
* Program	111 <small>Format: 3 digit number ###</small>
Date Funds End	
* Annual Amount	\$45,000
* Percentage of FTE	1.0

☐ Remove Entry?

[Add Funding Source Details Entry](#)

**Funding information will be copied in from the prior posting, which you can edit as necessary.**

**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.**

**IMPORTANT NOTE:**  
Remember to click "Save" after each funding source is entered.

[Save](#) [<< Prev](#) [Next >>](#)

## [Create New SHRA Posting from an Existing Posting – Supplemental Questions Tab](#)

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Once done, click on the **Next >>** button to save changes and proceed to the next tab:

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions**
- Applicant Documents
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

**Supplemental Questions**

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

Adding Existing Posting 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.

Submitting New Posting Questions: To submit a new question for review and approval, click on the button labeled "Add a Question". When the Available Supplemental Questions box opens, click on the "Add a New One" link in the bottom right hand corner.

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.

**Included Supplemental Questions**

Position	Required	Category	Question	Status
----------	----------	----------	----------	--------

Save << Prev Next >>

**Click to add supplemental questions.**

Add a question

**Adding Existing Posting 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. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the "Add a New One" link in the bottom right hand corner.

**Add a Question**

**Available Supplemental Questions**

Category: **Any** Keyword:

**Filter supplemental questions by keyword or category.**

Add	Category	Question
<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?
<input type="checkbox"/>	Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?
<input type="checkbox"/>	Education	Do you have a high school diploma or equivalent?
<input type="checkbox"/>	Experience	Do you have HR experience?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Experience	How many years of Accounting experience do you have in a higher education setting?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Experience	Do you have at least 4 years of experience?

**Click to submit a custom supplemental question for review and approval.**

Displaying all 10

Can't find the one you want? [Add a new one](#)

**Click check box to add an existing supplemental question.**

**Click Submit when finished.**

Submit Cancel

**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.

**Included Supplemental Questions** Add a question

Position	Required	Category	Question	Status
1	<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?	active <span>✕</span>
2	<input type="checkbox"/>	Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?	active <span>✕</span>
3	<input type="checkbox"/>	Education	Do you have a High School diploma?	active <span>✕</span>
4	<input type="checkbox"/>	Experience	How many years of Accounting experience do you have?	active <span>✕</span>

**Click to make questions required.**

**Reorder questions.**

**Assign points to answers.**

Possible Answers: Predefined Options

Answer	Points	Disqualifying
1. 0 years	<input type="text"/>	<input type="checkbox"/>
2. 1-3 years	<input type="text"/>	<input type="checkbox"/>
3. 4-5 years	<input type="text"/>	<input type="checkbox"/>
4. 5+ years	<input type="text"/>	<input type="checkbox"/>

**Click to assign disqualifying answers.**

Next >>

## Create New SHRA Posting from an Existing Posting – Applicant Documents Tab

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the Next >> button to save changes and proceed to the next tab:

Postings / SPA / Employee Relations Counselor (TLB10) (Draft) / Edit: Applicant Documents

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents**
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

Included to make the document(s) mandatory to complete the application process.

Order	Name	Included?	Required?
1	Resume	<input type="checkbox"/>	<input type="checkbox"/>
2	Cover Letter	<input type="checkbox"/>	<input type="checkbox"/>
3	Curriculum Vitae	<input type="checkbox"/>	<input type="checkbox"/>
4	Teaching Philosophy	<input type="checkbox"/>	<input type="checkbox"/>
5	Letter Of Reference 1	<input type="checkbox"/>	<input type="checkbox"/>
6	Letter Of Reference 2	<input type="checkbox"/>	<input type="checkbox"/>
7	Letter Of Reference 3	<input type="checkbox"/>	<input type="checkbox"/>

**Click Included to make uploading a document optional.**

**Click both Included and Required to make uploading a document required.**

Next >>

## Create New SHRA Posting from an Existing Posting – Search Committee Tab

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search<sup>10</sup>



committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Postings / SPA / Employee Relations Counselor (TLB10) (Draft) / Edit: Search Committee

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- Search Committee**
- Ranking Criteria
- Posting Documents
- Summary

**Search Committee** Save << Prev Next >>

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

**Search Committee Members**

No Search Committee Members have been assigned to this Posting yet.

**Search**

Find a User to assign as a Search Committee Member.

First Name

Last Name

Email Address

**To search for a pre-approved search committee member, enter the name and click the Search button.**

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

**Search Committee Members**

No Search Committee Members have been assigned to this Posting yet.

**Search**

Find a User to assign as a Search Committee Member.

Name	Email Address	Add Member
Lonnie Crotts	emailaddress@zed.zed	<input type="button" value="Add Member"/> <input type="checkbox"/> Make Member The Committee Chair

First Name

Last Name

Email Address

**Click the check box to assign the search committee member as the committee chair.**

**Click the Add Member button to add the search committee member you searched for.**

To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

**New Search Committee Member**

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (\*).

**Account Information**

Please enter the following information to create an account for a new Search Committee Member

\* First Name

\* Last Name

\* Email

\* Username

**To create an account for a new search committee member, complete the fields and click submit.**

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

**Matching User**

**Username** ambraun  
**First Name** Amy  
**Last Name** Braun  
**Email** emailaddress@zed.zed  
**Preferred Group** Employee

[Add User](#)

[Clear Matching Users](#)

**New Search Committee Member**

Request that someone be granted access to the system.

Required fields are indicated with an asterisk (\*).

**Account Information**

Please enter the following information to create an account for a new Search Committee Member.

\* **First Name** Amy  
\* **Last Name** Braun  
\* **Email** ambraun@ncat.edu  
\* **Username** ambraun

[Submit](#)

[Save](#) [<< Prev](#) [Next >>](#)

## Create New SHRA Posting from an Existing Posting – Ranking Criteria Tab

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- Search Committee
- Ranking Criteria**
- Posting Documents
- Summary

**Ranking Criteria**

Ranking Criteria can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant.

Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval.

Submitting New Ranking Criteria: To submit a new ranking criterion, click on the "Add a Criterion" button. When the Available Evaluative Criteria box opens, click on the "Add" button.

**Included Evaluative Criteria**

Category	Description	Weight	Workflow State	Status
----------	-------------	--------	----------------	--------

[Add a Criterion](#)

[Save](#) [<< Prev](#) [Next >>](#)

To add ranking criteria, click on the button labeled **“Add a Criterion”**. A dialog box will appear where you can add an existing criterion by checking the box in the “Add” column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **“Add a Criterion,”** then click on the **“Add a new one”** link in the bottom right hand corner of the dialog box that opens.

**Add a Ranking Criterion**

Available Evaluative Criteria

Category: Any Keyword:

**Search for ranking criteria by keyword or category.**

Add	Category	Description
<input type="checkbox"/>	Uncategorized	Rank Experience - 5 is the highest

Possible Answers:

- 1
- 2
- 3
- 4
- 5

**Indicate the applicant workflow state that allows an applicant to be ranked.**

Applicant workflow state: Under Review by HR

<input type="checkbox"/>	Uncategorized	Please rate the candidates experience related to the job:
<input type="checkbox"/>	Uncategorized	Teaching experience in a university

**Click to submit a custom ranking criterion for review and approval.**

Displaying all 3

Can't find the one you want? [Add a new one](#)

**Click check box to add an existing ranking criterion.**

**Click Submit when finished.**

Postings / SPA / Employee Relations Counselor (TLB10) (Draft) / Edit: Ranking Criteria

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- Search Committee
- Ranking Criteria**
- Posting Documents
- Summary

**Ranking Criteria**

Ranking Criteria can be used by search committee members to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant.

Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval.

Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled "Add a Criterion". When the Available Evaluative Criteria box opens, click on the "Add a new one" link in the bottom right hand corner.

**Click Save or Next to move to the next tab.**

**Included Evaluative Criteria**

Category	Description	Weight	Workflow State	Status
Uncategorized	Teaching experience in a university		Under Review by Dept/Committee	active
Uncategorized	Please rate the candidates experience related to the job:		Under Review by Dept/Committee	active
Uncategorized	Rank Experience - 5 is the highest		Under Review by Dept/Committee	active

## Create New SHRA Posting from an Existing Posting – Posting Documents Tab

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting 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.

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

The screenshot shows the 'Posting Documents' tab within the 'Employee Relations Counselor (TLB10) (Draft)' posting. The left sidebar lists various tabs, with 'Posting Documents' selected. The main content area provides instructions on how to add documents and lists supported file types. A table shows the current document 'Marketing Plan' with an 'Actions' dropdown menu. A red arrow points to the 'Actions' menu, which contains 'Upload New', 'Create New', and 'Choose Existing'. Another red arrow points to the 'Save' and 'Next >>' buttons at the bottom right. Two callout boxes provide additional instructions: one points to the 'Actions' menu with the text 'Click “Actions”, then select Upload New, Create New, or Choose Existing in order to upload an attachment.', and another points to the 'Save' and 'Next >>' buttons with the text 'Complete this page by clicking on Save and Next >>'.

Click “Actions”, then select Upload New, Create New, or Choose Existing in order to upload an attachment.

Complete this page by clicking on Save and Next >>

## Create New SHRA Posting from an Existing Posting – Summary Tab

The **Summary Tab** allows you to perform a final review all of the posting 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 posting summary carefully before continuing.

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

The screenshot shows the 'Summary' tab for the 'Employee Relations Counselor (TLB10) (SPA)' posting. The top section displays the posting title and status. Below this, there are tabs for 'Summary', 'History', 'Settings', 'Hiring Proposals', and 'Associated Position Description'. The main content area contains instructions for reviewing the posting details. A red arrow points to the 'Edit' link next to the 'Posting Details' tab. A callout box points to this 'Edit' link with the text 'Click “Edit” to make edits to a tab.' Another callout box points to the 'Posting Details' tab with the text 'Blue Circle Check'. The bottom section shows a table with classification information.

Click “Edit” to make edits to a tab.

Blue Circle Check

Classification Information	
Human Resources Specialist	
11804	
Classification Type	SPA
Salary Range	\$29,709 - \$58,106

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 **Summary Tab** by clicking on the link in the left column:



**Orange Circle Exclamation Point**

Click **“Edit”** to make edits to a tab.

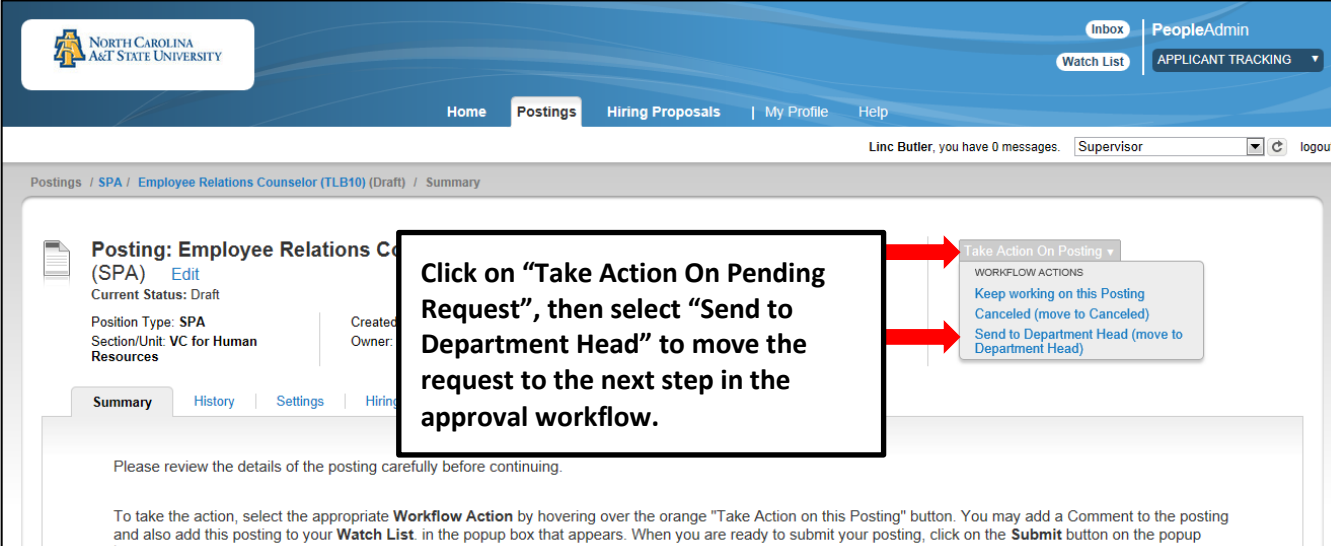
Position Funding Information [Edit](#)

Budget Advisory Approval

EPA and SPA positions that are funded in whole or in part by general state funds requires approval by A&T's Budget Advisory  
consideration of the Committee's review process, state below what mission specific, essential, and / or key objectives will not be met if the

Mission Specific, Essential and/or Key Objectives not Met without position Test

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)”**:



Click on **“Take Action On Pending Request”**, then select **“Send to Department Head”** to move the request to the next step in the approval workflow.

Take Action On Posting

WORKFLOW ACTIONS

- Keep working on this Posting
- Canceled (move to Canceled)
- Send to Department Head (move to Department Head)

Posting: Employee Relations Counselor (TLB10) (Draft) / Summary

Posting: Employee Relations Counselor (SPA) [Edit](#)

Current Status: Draft

Position Type: SPA

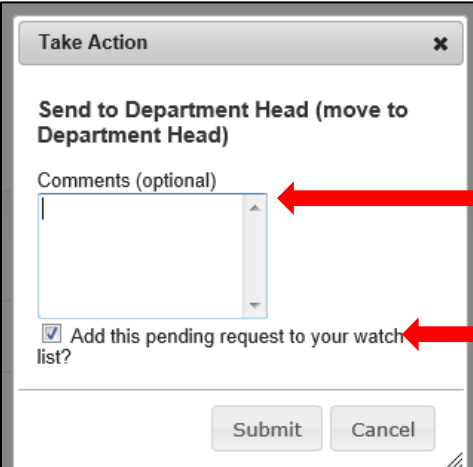
Section/Unit: VC for Human Resources

Summary History Settings Hiring

Please review the details of the posting carefully before continuing.

To take the action, select the appropriate **Workflow Action** by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your **Watch List** in the popup box that appears. When you are ready to submit your posting, click on the **Submit** button on the popup box.

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:



**Take Action**

Send to Department Head (move to Department Head)

Comments (optional)

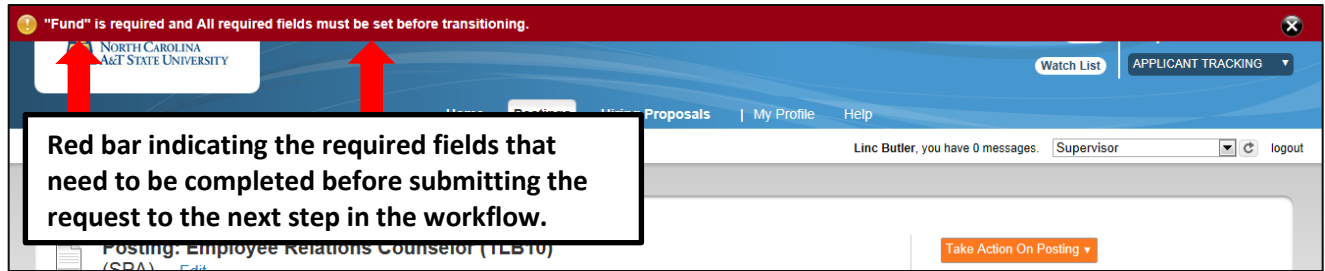
☒ Add this pending request to your watch list?

Submit Cancel

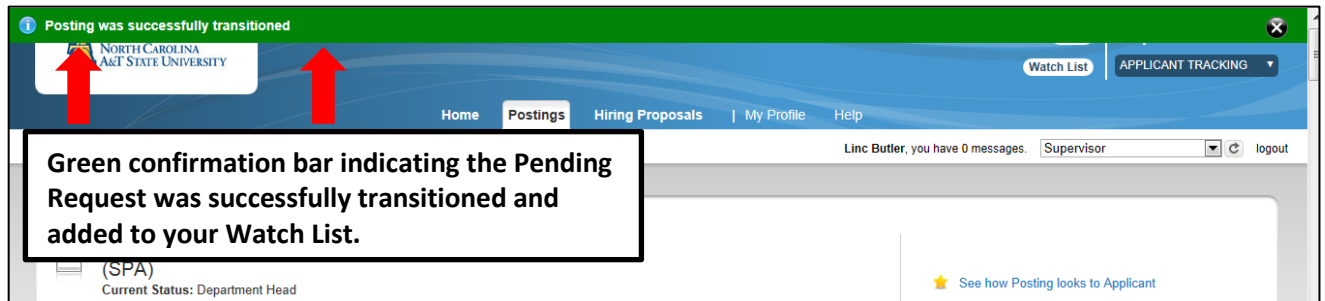
Comments are optional and can be viewed by the next level approver in the History tab.

Adding the action to your Watch List allows you to easily track and monitor the action's progress.

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:



Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

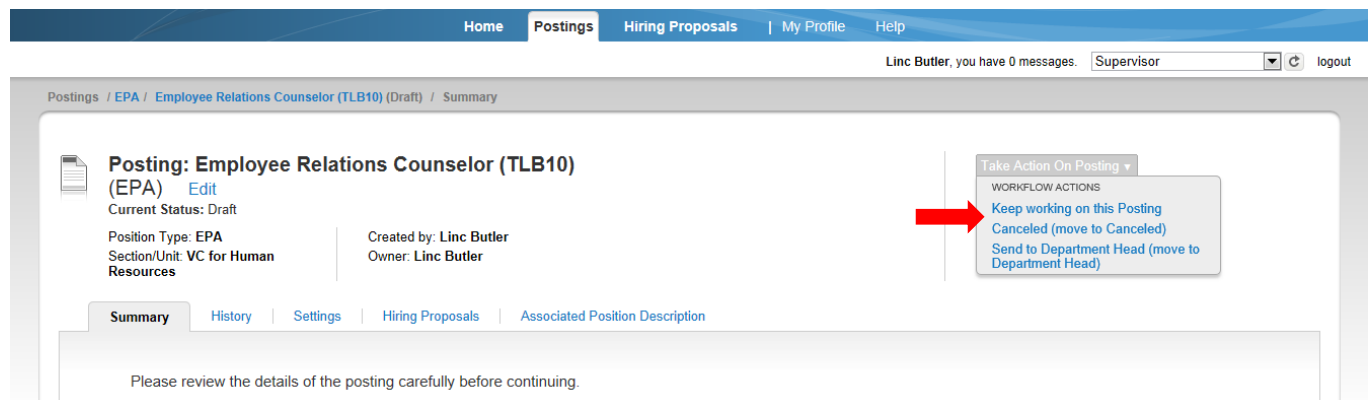


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## Create New SHRA Posting from an Existing Posting - Saving to Return to a Pending Request Later

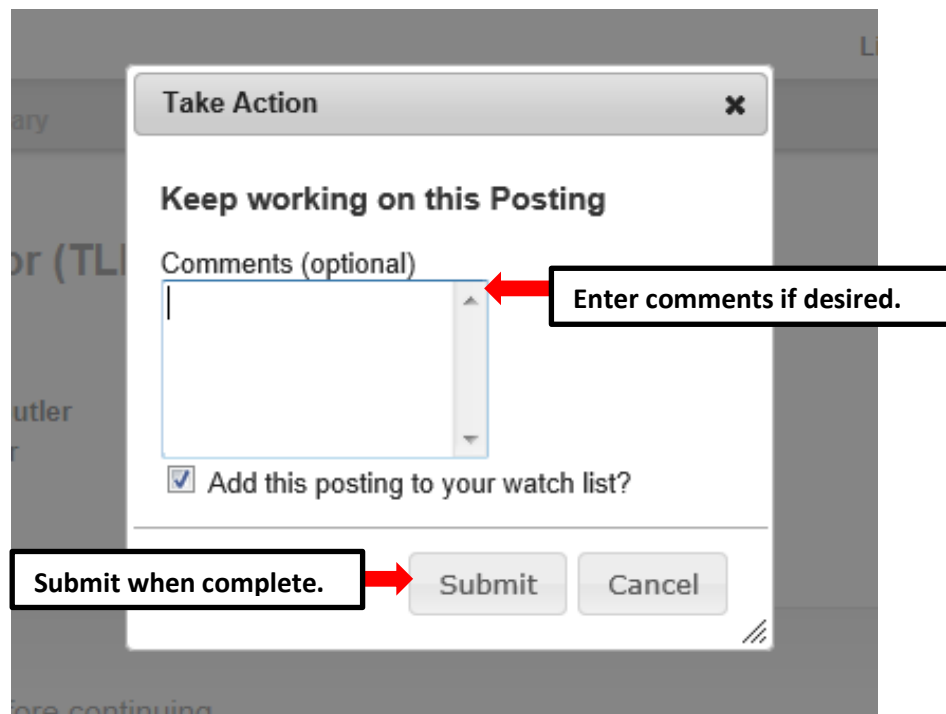
On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the “Save” button located in either the top or bottom right corner
- 2) Select “Summary” from the Tab List (illustrated above)
- 3) Select “Keep Working on this Posting”





- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click "Submit"



The screenshot shows a 'Take Action' dialog box with a close button (X) in the top right corner. The main heading is 'Keep working on this Posting'. Below this is a section titled 'Comments (optional)' with a text input field. A red arrow points from a callout box containing the text 'Enter comments if desired.' to the input field. Below the input field is a checkbox labeled 'Add this posting to your watch list?' which is checked. At the bottom of the dialog are two buttons: 'Submit' and 'Cancel'. A red arrow points from a callout box containing the text 'Submit when complete.' to the 'Submit' button.

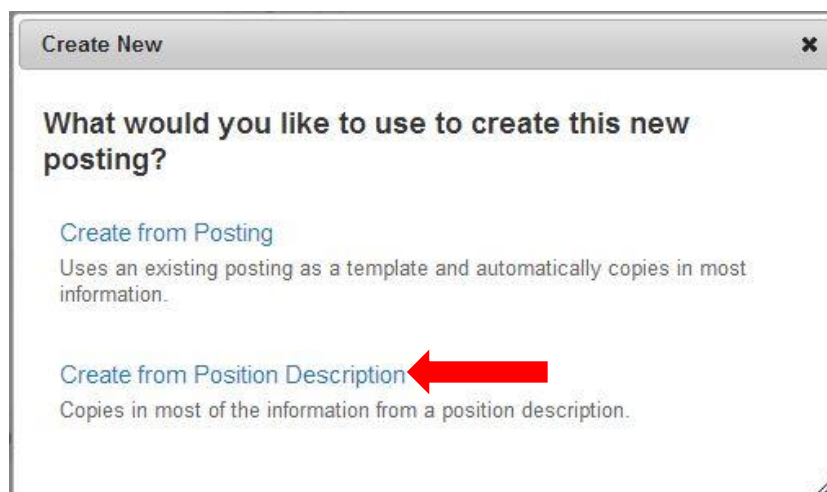
The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "**SHRA**". You will then return to the **SHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

## [Create New SHRA Posting - Create from Position Description](#)

Select **Create from Position Description** if you wish to create a posting using information from a position description that has previously been approved in the PeopleAdmin system.

**PLEASE NOTE:** If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Position Description** option copies information from an existing position description into a new posting:



The screenshot shows a 'Create New' dialog box with a close button (X) in the top right corner. The main heading is 'What would you like to use to create this new posting?'. Below this are two options, each with a description: 'Create from Posting' (Uses an existing posting as a template and automatically copies in most information.) and 'Create from Position Description' (Copies in most of the information from a position description.). A red arrow points to the 'Create from Position Description' option.

After clicking on **Create from Position Description**, you will be taken to the **SHRA Position Descriptions** view, where you can search position descriptions by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. Searches are fully customizable by position attributes, and you can save custom searches for use again later. If you need assistance in finding the desired position description, please contact the [Classification and Compensation Analyst](#) in the Division of Human Resources:

The screenshot shows the 'SPA Position Descriptions' page. A callout box labeled 'Active user type is Supervisor.' points to the 'Supervisor' dropdown menu in the top right. Another callout box labeled 'Searches are customizable by position attributes and can be saved for later use.' points to the search filters (Search, Add Column, Department, First Name). A third callout box labeled 'List of current / pending SHRA postings by active user type.' points to the table of results. A fourth callout box labeled 'Actions drop down menu.' points to the 'Actions' column in the table.

Working Position Title	Position Number	Employee First Name	Employee Last Name	Position/Classification Title	Department	Supervisor	Status	(Actions)
Administrative Support Spec	000018	Belinda	Macklin	Administrative Support Spec	HR Systems	Asst VC-Human Resources (Linc Butler)	Active	Actions
Human Resources Specialist	000025	Ester	Jones	Human Resources Specialist	Benefits	Human Resources Consultant (Nanita Cole)	Active	Actions
Human Resources Consultant	000033	Nanita	Cole	Human Resources Consultant	Benefits	Asst VC-Human Resources (Linc Butler)	Active	Actions
Human Resources Specialist	LC0040	Lonnie	Crofts	Human Resources Consultant	Recruitment and Retention	Asst VC-Human Resources (Linc Butler)	Active	Actions
Human Resources Consultant	000051	Amy	Braun	Human Resources Consultant	Classification & Compensation	Asst VC-Human Resources (Linc Butler)	Active	Actions
Human Resources Consultant	000057	Courtney	Caney	Human Resources Consultant	Temporary Employment	Human Resources Consultant (Tammie Hill)	Active	Actions
Human Resources Specialist	000066	Linda	Smith	Human Resources Specialist	Student & Foreign National Employment	Human Resources Specialist (Penelope Smith)	Active	Actions

Once you locate the position description you wish to create from, you can select it by moving your cursor over that position description's corresponding **Actions** drop down menu located in the far right column and clicking on **Create From**. This drop down menu will also give you the option of **View** if you wish to view the information associated with a particular position description prior to selecting **Create From**:

A close-up of the 'Actions' dropdown menu. A callout box labeled 'Click here' points to the 'Create From' option.

By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange **Create New Posting** button to begin updating posting information:

The screenshot shows the 'New Posting' form with several annotations:

- Create new posting button.**: Points to the 'Create New Posting' button in the top right corner.
- Confirm Organizational Unit information.**: Points to the 'Organizational Unit' section, which includes fields for 'Division/School/College', 'Department', and 'Section/Unit', all set to 'VC for Human Resources'.
- Include special offline application instructions if necessary.**: Points to the 'Special offline application instructions' text area.
- Create new posting button.**: Points to the 'Create New Posting' button in the bottom right corner.

After clicking on the **“Create New Posting”** button, you will then be taken to the **Posting Details** tab, the first information tab that must be completed before the new **SHRA Posting** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Posting** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all others will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the **Next >>** button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the **“Save”** button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the new **SHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields:

The screenshot shows the 'Posting Details' form with several annotations:

- Tab list**: Points to the left-hand navigation menu containing tabs like 'Position Funding Infor...', 'Supplemental Questions', 'Applicant Documents', 'Search Committee', 'Ranking Criteria', 'Posting Documents', and 'Summary'.
- Blue Check Circle**: Points to a blue checkmark icon next to the 'Summary' tab in the left-hand navigation menu.
- Save and Next buttons.**: Points to the 'Save' and 'Next >>' buttons in the top right corner.

The main content area shows the 'Posting Details' tab with a 'Check spelling' button and a 'Required Information' section for 'Classification Information'. It includes fields for 'Position/Classification Title' (Human Resources Specialist), 'Job Code' (11804), and 'Classification Type' (SPA).

## Create New SHRA Posting from a Position Description – Posting Details Tab

Since you are creating a new **SHRA Posting** from an approved position description, many of the fields will already be filled in with information copied from the position description. Follow the instructions at the top of the page to complete any remaining required fields, then click the **Next >>** button to save changes and navigate to the next tab:

**Save and Next buttons.**

**Fields from the approved position description will be copied in to your new posting.**

**Enter a hiring range if desired.**

**Enter preferred years of experience, skills, training and education.**

**Click to view Competency Profile.**

**Position Overview**

**Primary Purpose of Position** Test

**Primary Function of Organizational Unit** Test

**Work Hours: From [time] to [time] on [days of week]** M-f 8-5pm

**Key Responsibilities and Related Competencies**

**Required Competency** Applied Knowledge - HR Program and Organization

**Description** Performs X, Y, and Z.

**Required Competency** Customer Service

**Description** Performs A, B, and C.

**Required Competency** Communication - Verbal/Written

**Description** Performs H.

**Position Overview and Key Responsibilities and Related Competencies: Continue to enter posting information into any empty fields as needed.**

Position Information

*	Working Title	Employee Relations Counselor (TLB10)
	Competency Level	Journey
	Position Number	TLB10
*	JCAT	12345
	Approved Salary	\$45,000
*	Salary Grade Equivalent	
*	FLSA	Exempt
*	Appointment Type	Permanent - Full-time
	FTE	
	If Time Limited, Appointment Length	<div style="border: 1px solid #ccc; width: 80px; height: 20px; margin-bottom: 5px;"></div> <small>If time limited, please indicate budget end date. If funded from more than one fund, indicate earliest end date. This field cannot be left blank if the "Time Limited" field above is checked selected.</small>

**Position Information:** Continue to enter posting information into any empty fields as needed.

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Close Date**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for SHRA positions is five (5) calendar days. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff. For SHRA positions, the appropriate **Fast Find** selection is "Staff":

Posting Detail Information

*	Supervisor	Select Some Options	This field is required.
*	Applicant Reviewer	Select Some Options	This field is required.
	Posting Number		
*	Open Date		This field is required.
*	Close Date		This field is required.
	Special Instructions to Applicant		
*	Fast Find Information	Please select ▼	This field is required.

**Supervisor and / or Applicant Reviewer access to the posting.**

**Minimum allowable posting period is five (5) calendar days.**

**Select the most appropriate Fast Find category for the posting.**

Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the **Next >>** button to save your changes and move to the next tab. You can also click the “Save” button if you wish to save your changes and keep working on the current tab.

The screenshot shows the 'Posting Details' tab with three main text areas: 'Advertising Summary', 'Pass Message', and 'Fail Message'. A red arrow points from a text box to the 'Advertising Summary' field, indicating where to include special advertising requests. Another red arrow points from a text box to the 'Save' and 'Next >>' buttons at the bottom right, indicating where to save changes and proceed.

**Advertising Summary**

Please list additional external advertising sources if different than standard advertising sources.

Standard sources include: NC Employment Security Commission & UNC General Administration

**Pass Message**

Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.

**Fail Message**

Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.

**Save and Next buttons.**

Save Next >>

## Create New SHRA Posting from a Position Description – Position Funding Information Tab

In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by the University’s Budget Advisory Committee:

The screenshot shows the 'Position Funding Information' tab. A sidebar on the left lists various sections, with 'Position Funding Information' selected. The main content area includes a 'Check spelling' button, a 'Required Information' section, and a 'Budget Advisory Approval' section. A red arrow points from a text box to the 'Budget Advisory Approval' section, indicating where to state mission specific, essential, and/or key objectives that will not be met if the position is not filled.

Editing Posting

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

**Position Funding Information**

Save << Prev Next >>

Check spelling

\* Required Information

Budget Advisory Approval

All recruitment of permanent EPA and SPA positions that are funded in whole or in part by general state funds requires approval by the University’s Budget Advisory Committee. To receive consideration of the Committee’s review process, state what mission specific, essential, and / or key objectives will not be met if the position is not filled.

Mission Specific, Essential and/or Key Objectives not Met without position

**State what mission specific, essential, and/or key objectives will not be met if position is not filled.**



Funding Source information from prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

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.

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. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **Next >>** to move to the next tab:

Funding Source Details

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.

State Appropriated Funding / Non-State Appropriated Funding

State Appropriated Funding

If non-state, select source of funding

Please select

If other, designate source

Budget Code

16070 (State)

Fund

111111

Format: 6 digit number #####

Org

11111

Format: 5 digit number #####

Account

11111

Format: 5 digit number #####

Program

111

Format: 3 digit number ###

Date Funds End

Annual Amount

\$45,000

Percentage of FTE

1.0

☐ Remove Entry?

Add Funding Source Details Entry

Funding information will be copied in from the prior posting, which you can edit as necessary.

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.

IMPORTANT NOTE: Remember to click "Save" after each funding source is entered.

Save << Prev Next >>

## Create New SHRA Posting from a Position Description – Supplemental Questions Tab

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Once done, click on the **Next >>** button to save changes and proceed to the next tab:

123

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions**
- Applicant Documents
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

**Supplemental Questions**

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

Adding Existing Posting 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.

Submitting New Posting Questions: To submit a new question for review and approval, click on the button labeled "Add a Question". When the Available Supplemental Questions box opens, click on the "Add a New One" link in the bottom right hand corner.

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.

**Included Supplemental Questions**

Position	Required	Category	Question	Status
----------	----------	----------	----------	--------

Click to add supplemental questions.

Save << Prev Next >>

**Adding Existing Posting 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. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the "Add a New One" link in the bottom right hand corner.

**Add a Question**

**Available Supplemental Questions**

Category: **Any** Keyword:

Filter supplemental questions by keyword or category.

Add	Category	Question
<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?
<input type="checkbox"/>	Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?
<input type="checkbox"/>	Education	Do you have a high school diploma or equivalent?
<input type="checkbox"/>	Experience	Do you have HR experience?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Experience	How many years of Accounting experience do you have in a higher education setting?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Experience	Do you have at least 4 years of experience?

Click to submit a custom supplemental question for review and approval.

Click check box to add an existing supplemental question.

Displaying all 10

Can't find the one you want? [Add a new one](#)

Click Submit when finished.

Submit Cancel

**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.

**Included Supplemental Questions** Add a question

Position	Required	Category	Question	Status
1	<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?	active <span>✕</span>
2	<input type="checkbox"/>	Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?	active <span>✕</span>
3	<input type="checkbox"/>	Education	Do you have a High School diploma?	active <span>✕</span>
4	<input type="checkbox"/>	Experience	How many years of Accounting experience do you have?	active <span>✕</span>

Click to make questions required.

Reorder questions.

Assign points to answers.

Possible Answers: Predefined Options

Answer	Points	Disqualifying
1. 0 years	<input type="text"/>	<input type="checkbox"/>
2. 1-3 years	<input type="text"/>	<input type="checkbox"/>
3. 4-5 years	<input type="text"/>	<input type="checkbox"/>
4. 5+ years	<input type="text"/>	<input type="checkbox"/>

Click to assign disqualifying answers.

Next >>

## Create New SHRA Posting from a Position Description – Applicant Documents Tab

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the Next >> button to save changes and proceed to the next tab:

Postings / SPA / Employee Relations Counselor (TLB10) (Draft) / Edit: Applicant Documents

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents**
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

Included to make the document(s) mandatory to complete the application process.

Order	Name	Included?	Required?
1	Resume	<input type="checkbox"/>	<input type="checkbox"/>
2	Cover Letter	<input type="checkbox"/>	<input type="checkbox"/>
3	Curriculum Vitae	<input type="checkbox"/>	<input type="checkbox"/>
4	Teaching Philosophy	<input type="checkbox"/>	<input type="checkbox"/>
5	Letter Of Reference 1	<input type="checkbox"/>	<input type="checkbox"/>
6	Letter Of Reference 2	<input type="checkbox"/>	<input type="checkbox"/>
7	Letter Of Reference 3	<input type="checkbox"/>	<input type="checkbox"/>

Click **Included** to make uploading a document optional.

Click **both** **Included** **and** **Required** to make uploading a document required.

Next >>

## Create New SHRA Posting from a Position Description – Search Committee Tab

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search<sup>25</sup>

committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Postings / SPA / Employee Relations Counselor (TLB10) (Draft) / Edit: Search Committee

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- Search Committee**
- Ranking Criteria
- Posting Documents
- Summary

### Search Committee

Save << Prev Next >>

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

#### Search Committee Members

No Search Committee Members have been assigned to this Posting yet.

#### Search

Find a User to assign as a Search Committee Member.

First Name

Last Name

Email Address

**To search for a pre-approved search committee member, enter the name and click the Search button.**

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

### Search Committee Members

No Search Committee Members have been assigned to this Posting yet.

#### Search

Find a User to assign as a Search Committee Member.

Name	Email Address	Add Member
Lonnie Crotts	emailaddress@zed.zed	<input type="button" value="Add Member"/> <input type="checkbox"/> Make Member The Committee Chair

First Name

Last Name

Email Address

**Click the check box to assign the search committee member as the committee chair.**

**Click the Add Member button to add the search committee member you searched for.**

To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

### New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (\*).

**Account Information**

Please enter the following information to create an account for a new Search Committee Member

\* **First Name**

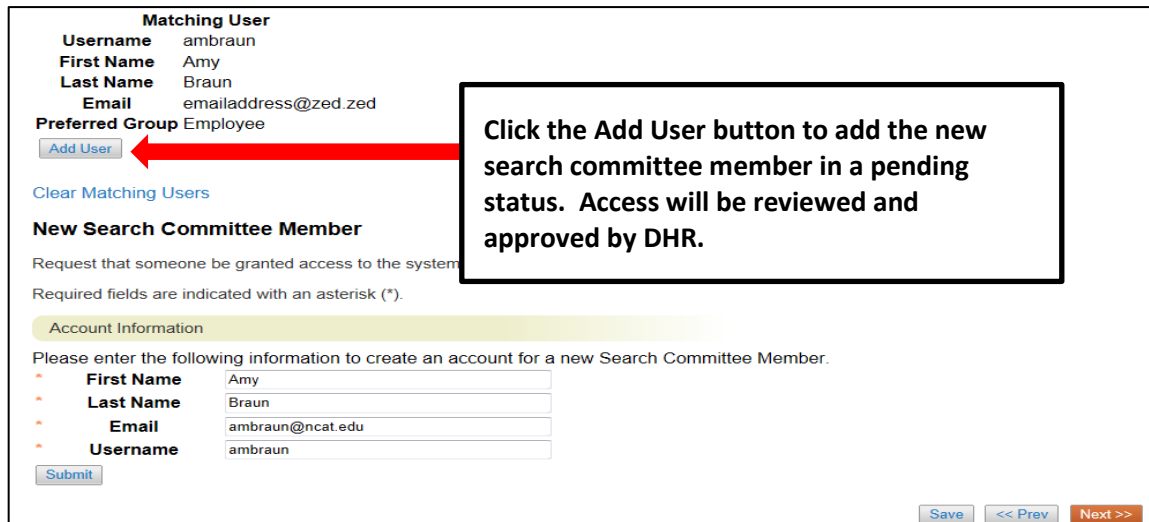
\* **Last Name**

\* **Email**

\* **Username**

**To create an account for a new search committee member, complete the fields and click submit.**

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:



**Matching User**

**Username** ambraun  
**First Name** Amy  
**Last Name** Braun  
**Email** emailaddress@zed.zed  
**Preferred Group** Employee

[Add User](#)

[Clear Matching Users](#)

**New Search Committee Member**

Request that someone be granted access to the system.

Required fields are indicated with an asterisk (\*).

**Account Information**

Please enter the following information to create an account for a new Search Committee Member.

\* **First Name** Amy  
\* **Last Name** Braun  
\* **Email** ambraun@ncat.edu  
\* **Username** ambraun

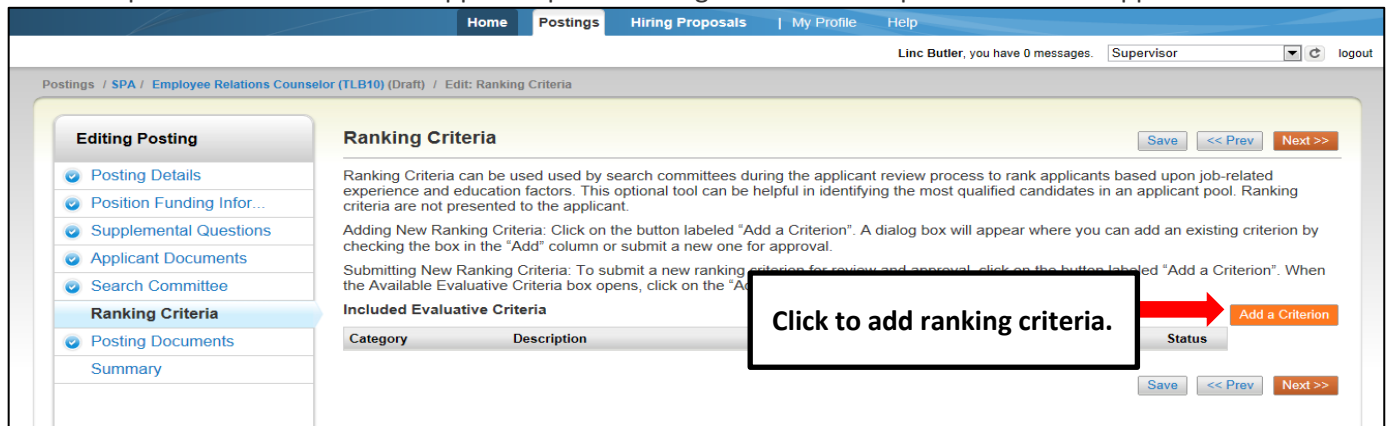
[Submit](#)

[Save](#) [<< Prev](#) [Next >>](#)

Click the Add User button to add the new search committee member in a pending status. Access will be reviewed and approved by DHR.

## Create New SHRA Posting from a Position Description – Ranking Criteria Tab

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:



**Ranking Criteria**

[Save](#) [<< Prev](#) [Next >>](#)

Ranking Criteria can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant.

Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval.

Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled "Add a Criterion". When the Available Evaluative Criteria box opens, click on the "Add" button.

**Included Evaluative Criteria**

Category	Description	Status
		<a href="#">Add a Criterion</a>

[Save](#) [<< Prev](#) [Next >>](#)

Click to add ranking criteria.

To add ranking criteria, click on the button labeled **“Add a Criterion”**. A dialog box will appear where you can add an existing criterion by checking the box in the “Add” column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **“Add a Criterion,”** then click on the **“Add a new one”** link in the bottom right hand corner of the dialog box that opens:

**Add a Ranking Criterion**

Available Evaluative Criteria

Category: Any Keyword:

**Search for ranking criteria by keyword or category.**

Add	Category	Description
<input type="checkbox"/>	Uncategorized	Rank Experience - 5 is the highest
Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5		
Applicant workflow state: <span>Under Review by HR</span>		
<input type="checkbox"/>	Uncategorized	Please rate the candidates experience related to the job
<input type="checkbox"/>	Uncategorized	Teaching experience in a university

**Indicate the applicant workflow state that allows an applicant to be ranked.**

**Click to submit a custom ranking criterion for review and approval.**

Displaying all 3

Can't find the one you want? [Add a new one](#)

**Click check box to add an existing ranking criterion.**

**Click Submit when finished.**

Postings / SPA / Employee Relations Counselor (TLB10) (Draft) / Edit: Ranking Criteria

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- Search Committee
- Ranking Criteria**
- Posting Documents
- Summary

**Ranking Criteria**

Ranking Criteria can be used by search committee members to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant.

Adding New Ranking Criteria: Click on the button labeled “Add a Criterion”. A dialog box will appear where you can add an existing criterion by checking the box in the “Add” column or submit a new one for approval.

Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled “Add a Criterion”. When the Available Evaluative Criteria box opens, click on the “Add a new one” link in the bottom right hand corner.

**Included Evaluative Criteria**

Category	Description	Weight	Workflow State	Status
Uncategorized	Teaching experience in a university		Under Review by Dept/Committee	active
Uncategorized	Please rate the candidates experience related to the job:		Under Review by Dept/Committee	active
Uncategorized	Rank Experience - 5 is the highest		Under Review by Dept/Committee	active

**Click Save or Next to move to the next tab.**

## Create New SHRA Posting from a Position Description – Posting Documents Tab

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting 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.

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

Click “Actions”, then select Upload New, Create New, or Choose Existing in order to upload an attachment.

Complete this page by clicking on Save and Next>>

Document Type	Name	Status	(Actions)
Marketing Plan			Upload New Create New Choose Existing
Print Ad Text			

## Create New SHRA Posting from a Position Description – Summary Tab

The **Summary Tab** allows you to perform a final review all of the posting 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 posting summary carefully before continuing.

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

Click “Edit” to make edits to a tab.

Blue Circle Check

Classification Information	
Human Resources Specialist	
11804	
Classification Type	SPA
Salary Range	\$29,709 - \$58,106



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 **Summary Tab** by clicking on the link in the left column:

Position Funding Information [Edit](#)

Budget Advisory Approval

**Orange Circle Exclamation Point**

EPA and SPA positions that are funded in whole or in part by general state funds requires approval by A&T's Budget Advisory

Mission Specific, Essential and/or Key Objectives not Met without position

Test

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)”**:

North Carolina A&T State University

Inbox PeopleAdmin

Watch List APPLICANT TRACKING

Home Postings Hiring Proposals My Profile Help

Linc Butler, you have 0 messages. Supervisor logout

Postings / SPA / Employee Relations Counselor (TLB10) (Draft) / Summary

**Posting: Employee Relations Counselor (SPA)** [Edit](#)

Current Status: Draft

Position Type: SPA

Section/Unit: VC for Human Resources

Created Owner:

Summary History Settings Hiring

**Click on “Take Action On Pending Request”, then select “Send to Department Head” to move the request to the next step in the approval workflow.**

Take Action On Posting

WORKFLOW ACTIONS

- Keep working on this Posting
- Canceled (move to Canceled)
- Send to Department Head (move to Department Head)

Please review the details of the posting carefully before continuing.

To take the action, select the appropriate **Workflow Action** by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your **Watch List** in the popup box that appears. When you are ready to submit your posting, click on the **Submit** button on the popup box.

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:

**Take Action**

**Send to Department Head (move to Department Head)**

Comments (optional)

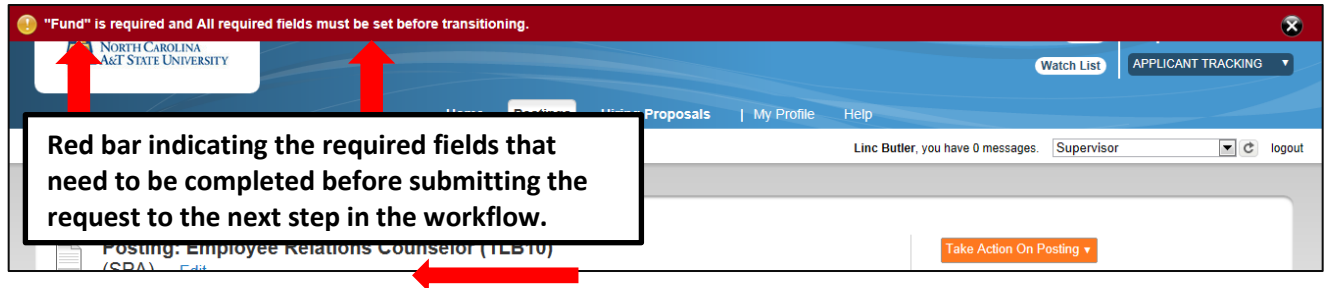
☒ Add this pending request to your watch list?

Submit Cancel

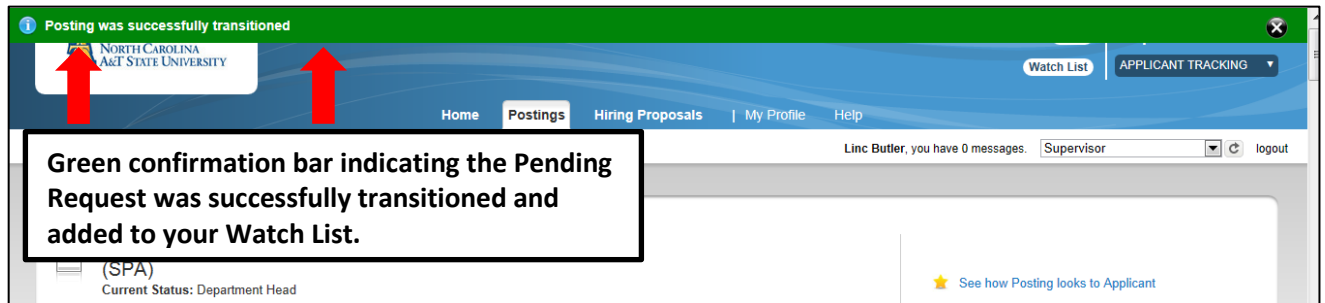
**Comments are optional and can be viewed by the next level approver in the History tab.**

**Adding the action to your Watch List allows you to easily track and monitor the action’s progress.**

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:



Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

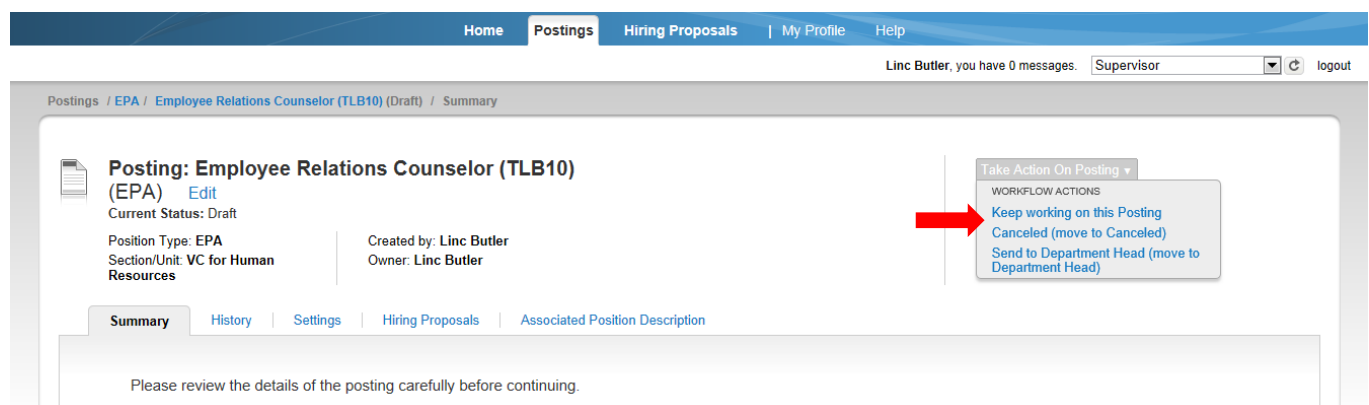


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## Create New SHRA Posting from a Position Description - Saving to Return to a Pending Request Later

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Posting"



- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click "Submit"

The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings** tab and click on "**SHRA**". You will then return to the **SHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

## Create New EHRA Posting

To initiate a **Create New EHRA Posting** request, hover your cursor over the **Postings** tab and click on "EHRA", or click on the **Create New EHRA Posting** link located in the **Shortcuts** menu to the right of your

You will then be taken to the **EHRA Postings** view, which provides a list of all current/pending EHRA postings initiated based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Current / pending postings for positions that are direct reports to the Supervisor only.
Department Head	Current / pending postings for all positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	Current / pending postings for all positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

In the **EHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting 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 current / pending EHRA postings by active user type.**

**Create New Posting**

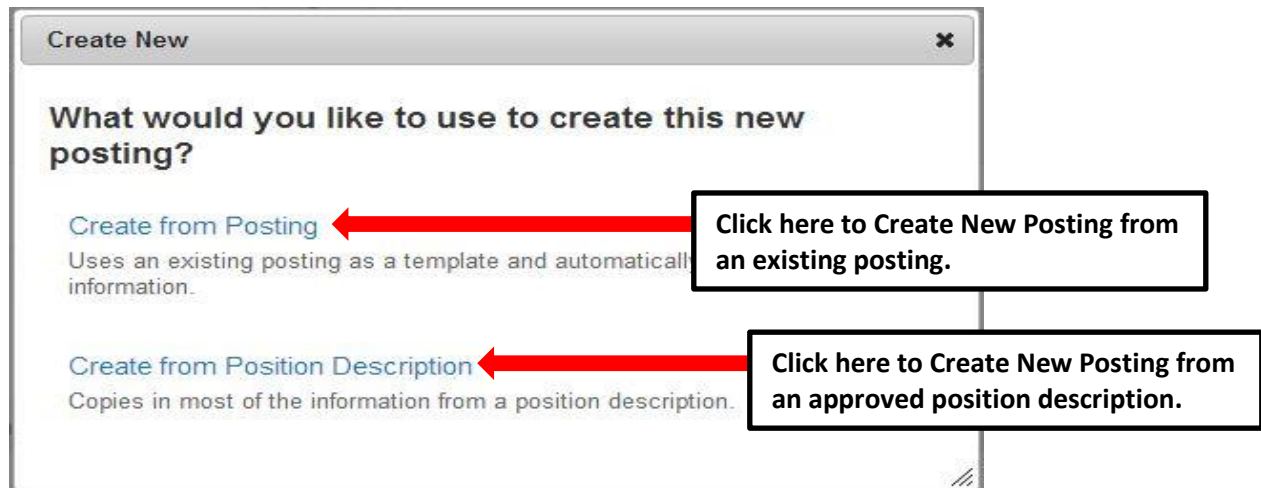
Position Title	Posting Number	Department	Active Applications	Workflow State	(Actions)
Director of Federal Policy Compliance		VC for Human Resources	0	Draft	Actions
Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions
Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions
Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions
Asst VC-Human Resources - LC		VC for Human Resources	0	Posted	Actions
Director-Employee Rel. AA		Employee Relations	0	Draft	Actions
Administrative Support Assoc - LC		Classification & Compensation	0	Closed	Actions
Administrative Support Assoc - LC		Classification & Compensation	0	Draft	Actions

To initiate the request, click on the orange **Create New Position Description** button located on the top right of the screen just below the grey bar:

**Click here to initiate a Create New Posting request.**

**Create New Posting**

You will then see the **Create New** menu, asking what you would like to use to create the new posting:

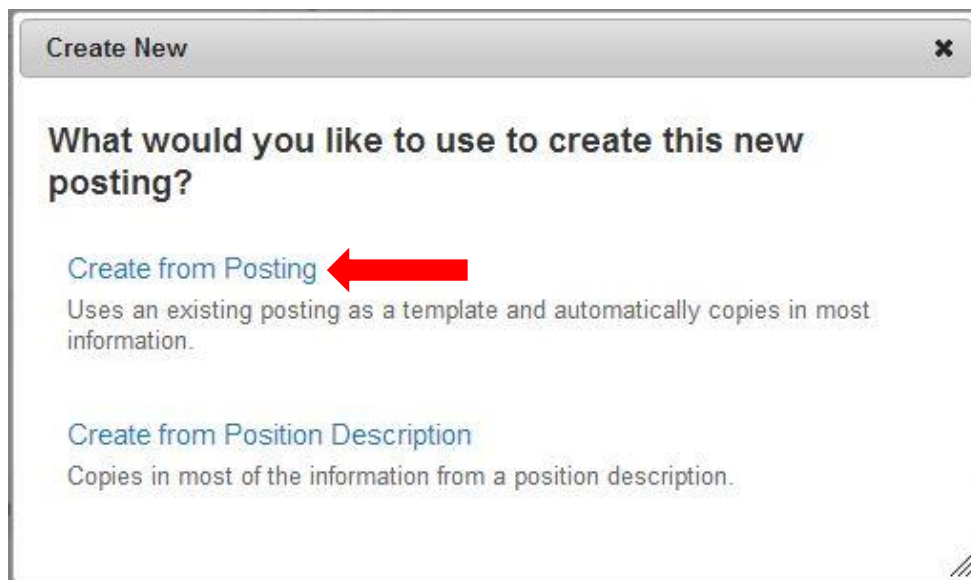


## Create New EHRA Posting – Create from Posting

Select **Create from Posting** if you have previously posted a position in the PeopleAdmin system and wish to post a position using the same or similar information from that prior posting.

**PLEASE NOTE:** If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Posting** option copies information from an existing posting into a new posting:



After clicking on **Create from Posting**, you will be taken to the **EHRA Postings** view, where you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later. If you need assistance in finding the desired posting, please contact a [Recruitment Coordinator](#) in the Division of Human Resources:

Active user type is Supervisor.

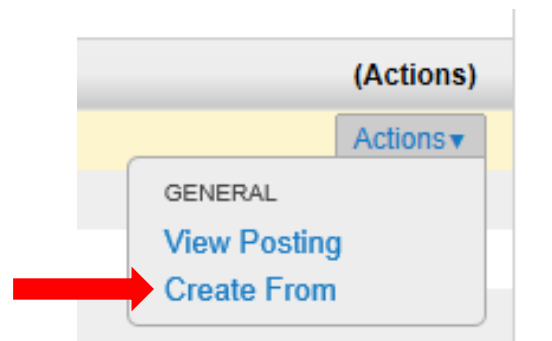
Searches are customizable by position attributes and can be saved for later use.

List of current / pending EHRA postings by active user type.

Actions drop down menu.

Position Title	Posting Number	Department	Active Applications	Workflow State	(Actions)
Director of Federal Policy Compliance		VC for Human Resources	0	Draft	Actions
Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions
Asst VC-Human Resources		VC for Human Resources	0	Draft	Actions
Asst VC-Human Resources - LC		VC for Human Resources	0	Draft	Actions
Director-Employee Rel. Ad.		Employee Relations	0	Posted	Actions
Administrative Support Assoc - LC		Classification & Compensation	0	Closed	Actions
Administrative Support Assoc - LC		Classification & Compensation	0	Draft	Actions

Once you locate the posting you wish to create from, you can select it by moving your cursor over that posting's corresponding **Actions** drop down menu located in the far right column and clicking on **Create From**. This drop down menu will also give you the option of **View Posting** if you wish to view the information associated with a particular posting prior to selecting **Create From**:



By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange **Create New Posting** button to begin updating posting information:

This screenshot shows the 'New Posting' form. Annotations include:

- Create new posting button.** Points to the 'Create New Posting' button in the top right corner.
- Confirm Organizational Unit information.** Points to the 'Organizational Unit' field, which is highlighted in red.
- Include special offline application instructions if necessary.** Points to the 'Special offline application instructions' text area.
- Create new posting button.** Points to the 'Create New Posting' button in the bottom right corner.

The form includes fields for Position Title, Organizational Unit, Department, and Section/Unit, all of which are currently set to 'Assistant Director for HR Systems', 'VC for Human Resources', and 'VC for Human Resources' respectively. There is also a checkbox for 'Accept online applications?' and a text area for 'Special offline application instructions'.

## Create New EHRA Posting from an Existing Posting – Edit Posting

After clicking on the “**Create New Posting**” button, you will then be taken to the **Posting Details** tab, the first information tab that must be completed before the new **EHRA Posting** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Posting** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while ~~all other~~ appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the **Next >>** button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the “**Save**” button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the new **EHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields:

This screenshot shows the 'Posting Details' form. Annotations include:

- Tab list** points to the left-hand navigation menu.
- Save and Next buttons.** Points to the 'Save' and 'Next >>' buttons in the top right corner.
- Blue Check Circle** points to the 'Posting Documents' tab in the left-hand navigation menu, which has a blue checkmark next to it.
- Required fields are in RED.** Points to the 'Salary Range' field, which is highlighted in red and has a red asterisk next to it.

The form includes a 'Check spelling' dropdown and a 'HELP TEXT' section. The 'Classification Information' section shows fields for Position/Classification Title, Job Code, Classification Type, and Salary Range. The 'Salary Range' field is currently empty and highlighted in red.



## Create New EHRA Posting from an Existing Posting – Posting Details Tab

Since you are creating a new **EHRA Posting** from an existing one, many of the fields will already be filled in with information copied from the existing posting. Follow the instructions at the top of the page to complete any remaining required fields, then click the **Next >>** button to save changes and navigate to the next tab:

Postings / EPA / Assistant Director for HR Systems (Draft) / Edit: Posting Details

**Editing Posting**

**Posting Details**

- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References/Letters of ...
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

### Posting Details

[Check spelling](#)

To create a Posting, first complete the information on this screen, then click the **Next** button or select the page in the left hand navigation menu. Proceed through all sections completing all necessary information. To submit the Posting to the next approval step, you must go to the **Posting Summary Page** by clicking on the **Next** button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options.

**\* Required Information**

**Classification Information**

HELP TEXT: If the details below are incorrect, please make the appropriate Classification selection using the "Classification" Tab on the left side menu while modifying the Position.

Position/Classification Title	Assistant Director
Job Code	82229
Classification Type	EPA
<b>* Salary Range</b>	\$55,000 - \$60,000
<small>Enter salary to be advertised amount or a description such as "commensurate with education and experience"</small>	
<b>Minimum Experience/Education</b>	

Save and Next buttons.

SaveNext >>

Fields from the existing posting will be copied in to your new posting.

**Position Overview**

Primary Purpose of Position	Test
Primary Function of Organizational Unit	Test

**Position Information**

<b>* Position Title</b>	Assistant Director for HR Systems
<b>* Working Title</b>	Assistant Director fo HR Systems
Position Number	000127
<b>* JCAT</b>	194X03
Approved Salary	\$60,000
<b>* FLSA</b>	Exempt
<b>* Appointment Type</b>	Permanent - Full-time
<b>* Tenure Track</b>	No
FTE	1 = 40 hours/week, 12 months
<b>* If Time Limited, Appointment Length</b>	<small>If time limited, please indicate budget end date. If funded from more than one fund, indicate earliest end date. This field cannot be left blank if the "Time Limited" field above is checked selected.</small>

Continue to enter or modify posting information into any empty and/or required fields as needed.

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for EHRA positions is thirty (30) calendar days, however, an EHRA posting can be posted as open until filled. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff:

**Posting Detail Information**

\* **Supervisor**  This field is required. Supervisor and / or Applicant Reviewer access to the posting.

\* **Applicant Reviewer**  This field is required.

**Posting Number**

\* **Open Date**  This field is required. Minimum allowable posting period is thirty (30) calendar days. Posting can also be open until filled.

**Date desired for closing or initial review (minimum 30 days).**

**Close Date**

**Open Until Filled** ☒ No

\* **Special Instructions to Applicant**  This field is required.

\* **Fast Find Information**  This field is required. Select the most appropriate Fast Find category for the posting.

Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the **Next >>** button to save your changes and move to the next tab. You can also click the “Save” button if you wish to save your changes and keep working on the current tab.

**Advertising Summary**  Include any special advertising request information.

Please list additional external advertising sources if different than standard advertising sources.  
Standard sources include: NC Employment Security Commission & UNC General Administration

\* **Pass Message**

\* **Fail Message**

**Save and Next buttons.**

## Create New EHRA Posting from an Existing Posting – Position Funding Information Tab

In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by the University's Budget Advisory Committee:

Postings / EPA / Assistant Director for HR Systems (Draft) / Edit: Position Funding Information

Editing Posting

- Posting Details
- Position Funding Information**
- Supplemental Questions
- Applicant Documents
- References/Letters of ...
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

Position Funding Information

Save << Prev Next >>

Check spelling

\* Required Information

Budget Advisory Approval

All recruitment of permanent EPA and SPA positions that are funded in whole or in part by general state funds requires approval by the University's Budget Advisory Committee. To receive consideration of the Committee's review process, you must state what mission specific, essential, and / or key objectives will not be met if the position is not filled.

Mission Specific, Essential and/or Key Objectives not Met without position

Test

State what mission specific, essential, and/or key objectives will not be met if position is not filled.

Funding Source Details

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

Funding Source information from the prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

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.

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. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **Next >>** to move to the next tab:

**Funding Source Details**

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.

**State Appropriated Funding / Non-State Appropriated Funding**

State Appropriated Funding:

If non-state, select source of funding:

If other, designate source:

**Budget Code**:

**Fund**:   
Format: 6 digit number #####

**Org**:   
Format: 5 digit number #####

**Account**:   
Format: 5 digit number #####

**Program**:   
Format: 3 digit number ###

**Date Funds End**:

**Annual Amount**:

**Percentage of FTE**:

☐ Remove Entry?

[Add Funding Source Details Entry](#)

**Funding information will be copied in from the prior posting, which you can edit as necessary.**

**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.**

**IMPORTANT NOTE:**  
Remember to click "Save" after each funding source is entered.

## Create New EHRA Posting from an Existing Posting – Supplemental Questions Tab

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Once [Next >>](#), click on the [Save](#) button to save changes and proceed to the next tab:

Postings / EPA / Assistant Director for HR Systems (Draft) / Edit: Supplemental Questions

**Editing Posting**

- [Posting Details](#)
- [Position Funding Infor...](#)
- [Supplemental Questions](#)
- [Applicant Documents](#)
- [References/Letters of ...](#)
- [Search Committee](#)
- [Ranking Criteria](#)
- [Posting Documents](#)
- [Summary](#)

**Supplemental Questions**

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

Adding Existing Posting 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.

Submitting New Posting Questions: To submit a new question for review and approval, click on the button labeled "Add a Question". When the Available Supplemental Questions box opens, click on the "Add a New One" link in the bottom right hand corner.

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.

**Included Supplemental Questions**

Position	Required	Category	Question	Status
<div style="border: 2px solid black; padding: 5px; display: inline-block;"> <b>Click to add supplemental questions.</b> </div> <div style="margin-left: 10px;"> <input type="button" value="Add a question"/> </div>				

**Adding Existing Posting 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. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the **"Add a New One"** link in the bottom right hand corner.

Add a Question

Available Supplemental Questions

Category: Any Keyword:

Add	Category	Question
<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?
<input type="checkbox"/>	Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?
<input type="checkbox"/>	Education	Do you have a high school diploma or equivalent?
<input type="checkbox"/>	Experience	Do you have HR experience?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Experience	How many years of Accounting experience do you have in a higher education setting?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Experience	Do you have at least 4 years of experience?

Displaying all 10

Can't find the one you want? [Add a new one](#)

Submit

Cancel

Filter supplemental questions by keyword or category.

Click to submit a custom supplemental question for review and approval.

Click check box to add an existing supplemental question.

Click Submit when finished.

**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.

Included Supplemental Questions

Add a question

Position	Required	Category	Question	Status
1	<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?	active
2	<input type="checkbox"/>	Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?	active
3	<input type="checkbox"/>	Education	Do you have a High School diploma?	active
4	<input type="checkbox"/>	Experience	How many years of Accounting experience do you have in a higher education setting?	active

Assign points to answers.

Possible Answers: Predefined Options

Answer	Points	Disqualifying
1. 0 years	<input type="text"/>	<input type="checkbox"/>
2. 1-3 years	<input type="text"/>	<input type="checkbox"/>
3. 4-5 years	<input type="text"/>	<input type="checkbox"/>
4. 5+ years	<input type="text"/>	<input type="checkbox"/>

Click to make questions required.

Reorder questions.

Click to assign disqualifying answers.

Next >>

## Create New EHRA Posting from an Existing Posting – Applicant Documents Tab

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the **Next >>** button to save changes and proceed to the next tab:

The screenshot shows the 'Applicant Documents' tab in the 'Editing Posting' section. A sidebar on the left lists various tabs, with 'Applicant Documents' selected. The main area contains a table with columns for 'Order', 'Name', 'Included?', and 'Required?'. Below the table, there is a 'Next >>' button. Two callout boxes provide instructions: one points to the 'Included?' column with the text 'Click Included to make uploading a document optional.', and another points to the 'Required?' column with the text 'Click both Included and Required to make uploading a document required.'

Order	Name	Included?	Required?
1	Resume	<input type="checkbox"/>	<input type="checkbox"/>
2	Cover Letter	<input type="checkbox"/>	<input type="checkbox"/>
3	Curriculum Vitae	<input type="checkbox"/>	<input type="checkbox"/>
4	Teaching Philosophy	<input type="checkbox"/>	<input type="checkbox"/>
5	Letter Of Reference 1	<input type="checkbox"/>	<input type="checkbox"/>
6	Letter Of Reference 2	<input type="checkbox"/>	<input type="checkbox"/>
7	Letter Of Reference 3	<input type="checkbox"/>	<input type="checkbox"/>

## Create New EHRA Posting from an Existing Posting – References / Letters of Recommendation Tab

In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted:

The screenshot shows the 'References/Letters of Recommendation' tab in the 'Editing Posting' section. A sidebar on the left lists various tabs, with 'References/Letters of Recommendation' selected. The main area contains a form with fields for 'Accept References', 'Minimum Requests', 'Maximum Requests', and 'Cutoff Date'. Below the form, there is a 'Save' button and '<< Prev' and 'Next >>' buttons. Three callout boxes provide instructions: one points to the 'Accept References' dropdown with the text 'Indicate Yes or No.', another points to the 'Minimum Requests' and 'Maximum Requests' fields with the text 'Recommended range is 3 to 5.', and a third points to the 'Cutoff Date' field with the text 'Reference information may not be submitted after this date.'

**References/Letters of Recommendation**

☐ Check spelling

**Accept References:** Please indicate whether or not you wish to require applicants to submit references with their application.

**Minimum Requests:** Please indicate the minimum number of references you would like applicants to submit.

**Maximum Requests:** Please indicate the maximum number of references you would like applicants to submit.

**Cutoff Date:** Please indicate the date by which reference information must be submitted.

\* Required Information

References/Letters of Recommendation

\* Accept References  Indicate Yes or No.

Minimum Requests

Maximum Requests

Cutoff Date

Recommended range is 3 to 5.

Reference information may not be submitted after this date.

## Create New EHRA Posting from an Existing Posting – Search Committee Tab

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of Human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

The screenshot shows the 'Search Committee' tab within a web application. On the left is a sidebar with a menu titled 'Editing Posting' containing links for 'Posting Details', 'Position Funding Infor...', 'Supplemental Questions', 'Applicant Documents', 'References/Letters of ...', 'Search Committee' (highlighted), 'Ranking Criteria', 'Posting Documents', and 'Summary'. The main content area is titled 'Search Committee' and includes a 'Save' button, '<< Prev' button, and 'Next >>' button. Below the title is a descriptive paragraph about search committees. Under the heading 'Search Committee Members', it states 'No Search Committee Members have been assigned to this Posting yet.' A 'Search' section follows with the instruction 'Find a User to assign as a Search Committee Member.' and input fields for 'First Name', 'Last Name', and 'Email Address', along with a 'Search' button. A red arrow points from a text box to the 'Search' button.

**To search for a pre-approved search committee member, enter the name and click the Search button.**

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

This screenshot shows the 'Search Committee Members' section. It starts with the text 'No Search Committee Members have been assigned to this Posting yet.' Below this is a 'Search' section with the instruction 'Find a User to assign as a Search Committee Member.' A table displays search results with columns 'Name', 'Email Address', and 'Add Member'. The first row shows 'Lonnie Crotts' with email 'emailaddress@zed.zed'. The 'Add Member' column contains an 'Add Member' button and a checkbox labeled 'Make Member The Committee Chair'. A red arrow points from a text box to this checkbox. Below the table are input fields for 'First Name' (Lonnie), 'Last Name' (Crotts), and 'Email Address', with a 'Search' button. A red arrow points from another text box to the 'Add Member' button.

**Click the check box to assign the search committee member as the committee chair.**

**Click the Add Member button to add the search committee member you searched for.**



To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

### New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (\*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

\*

First Name

\*

Last Name

\*

Email

\*

Username

Submit

To create an account for a new search committee member, complete the fields and click submit.

<< Prev

Next >>

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

Matching User

Username

ambraun

First Name

Amy

Last Name

Braun

Email

emailaddress@zed.zed

Preferred Group

Employee

Add User

Click the Add User button to add the new search committee member in a pending status. Access will be reviewed and approved by DHR.

Clear Matching Users

### New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (\*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

\*

First Name

Amy

\*

Last Name

Braun

\*

Email

ambraun@ncat.edu

\*

Username

ambraun

Submit

Save

<< Prev

Next >>

## Create New EHRA Posting from an Existing Posting – Ranking Criteria Tab

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

The screenshot shows the 'Ranking Criteria' tab within a web application. On the left is a sidebar titled 'Editing Posting' with a list of navigation items: Posting Details, Position Funding Infor..., Supplemental Questions, Applicant Documents, References/Letters of..., Search Committee, Ranking Criteria (highlighted), Posting Documents, and Summary. The main content area is titled 'Ranking Criteria' and contains instructional text about using ranking criteria. Below the text is a table with columns 'Category' and 'Description'. To the right of the table is a 'Status' dropdown menu. At the top right of the main area are buttons for 'Save', '<< Prev', and 'Next >>'. At the bottom right are buttons for 'Save', '<< Prev', and 'Next >>'. A red arrow points from a text box 'Click to add ranking criteria.' to an 'Add a Criterion' button located at the bottom right of the main content area.

To add ranking criteria, click on the button labeled **“Add a Criterion”**. A dialog box will appear where you can add an existing criterion by checking the box in the **“Add”** column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **“Add a Criterion,”** then click on the **“Add a new one”** link in the bottom right hand corner of the dialog box that opens:

The screenshot shows the 'Add a Ranking Criterion' dialog box. At the top is a title bar with a close button. Below is a section titled 'Available Evaluative Criteria'. It includes a 'Category' dropdown menu set to 'Any' and a 'Keyword' text input field. A red arrow points from a text box 'Search for ranking criteria by keyword or category.' to the 'Keyword' field. Below these are two rows of criteria, each with a checkbox in the 'Add' column. The first row is 'Uncategorized Rank Experience - 5 is the highest' and the second is 'Uncategorized Please rate the candidates experience related to th'. A red arrow points from a text box 'Click check box to add an existing ranking criterion.' to the checkbox of the second row. Below the criteria list is a 'Possible Answers' section with a list of numbers 1 through 5. Below that is an 'Applicant workflow state' dropdown menu set to 'Under Review by HR'. A red arrow points from a text box 'Indicate the applicant workflow state that allows an applicant to be ranked.' to this dropdown. At the bottom of the dialog are 'Submit' and 'Cancel' buttons. A red arrow points from a text box 'Click Submit when finished.' to the 'Submit' button. Another red arrow points from a text box 'Click to submit a custom ranking criterion for review and approval.' to the 'Add a new one' link at the bottom right of the dialog.



Postings / EPA / Assistant Director for HR Systems (Draft) / Summary

**Posting: Assistant Director for HR Systems (EPA)**  
[Edit](#)  
 Current Status: Draft  
 Position Type: EPA  
 Section/Unit: VC for Human Resources  
 Created by: Linc Butler  
 Owner: Linc Butler


[Take Action On Posting](#)  
[See how Posting looks to Applicant](#)  
[Print Preview \(Applicant View\)](#)  
[Print Preview](#)

**Summary** | History | Settings | Hiring Proposals | Associated Position Description

Please review the details of the posting carefully before continuing.

To take the action, select the appropriate **Workflow Action** by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your **Watch List** in the popup box that appears. When you are ready to submit your posting, click on the **Submit** button on the popup box.

To edit the posting, click on the **Edit** link next to the **Section Name** in the **Summary Section**. This will take you directly to the **Posting Page** to **Edit**. If a section has an orange icon with an exclamation point, you will need to review this section and make necessary corrections before moving to the next step in the workflow.

 **Posting Details** [Edit](#)

**Classification Information**  
 HELP TEXT: If the details below are incorrect, please use the menu while modifying the Position.

Assistant Director	82229
Classification Type	EPA
Salary Range	\$55,000 - \$60,000
Minimum Experience/Education	

**Click "Edit" to make edits to a tab.**

**Blue Circle Check**

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 **Summary Tab** by clicking on the link in the left column:

 **Position Funding Information** [Edit](#)

**Budget Advisory Approval**

EPA and SPA positions that are funded in whole or in part by general state funds requires approval by A&T's Budget Advisory Committee's review process, state below what mission specific, essential, and / or key objectives will not be met if the

**Mission Specific, Essential and/or Key Objectives not Met without position** Test

**Click "Edit" to make edits to a tab.**

**Orange Circle Exclamation Point**

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)"**:

NORTH CAROLINA A&T STATE UNIVERSITY

Inbox | PeopleAdmin | Watch List | APPLICANT TRACKING

Home | Postings | Hiring Proposals | My Profile | Help

Linc Butler, you have 0 messages. Supervisor log out

Postings / EPA / Assistant Director for HR Systems (Draft) / Summary

**Posting: Assistant Director for HR Systems (EPA)**  
[Edit](#)  
 Current Status: Draft  
 Position Type: EPA  
 Section/Unit: VC for Human Resources  
 Created by: Linc Butler  
 Owner: Linc Butler

[Take Action On Posting](#)  
 WORKFLOW ACTIONS  
[Keep working on this Posting](#)  
[Canceled \(move to Canceled\)](#)  
[Send to Department Head \(move to Department Head\)](#)

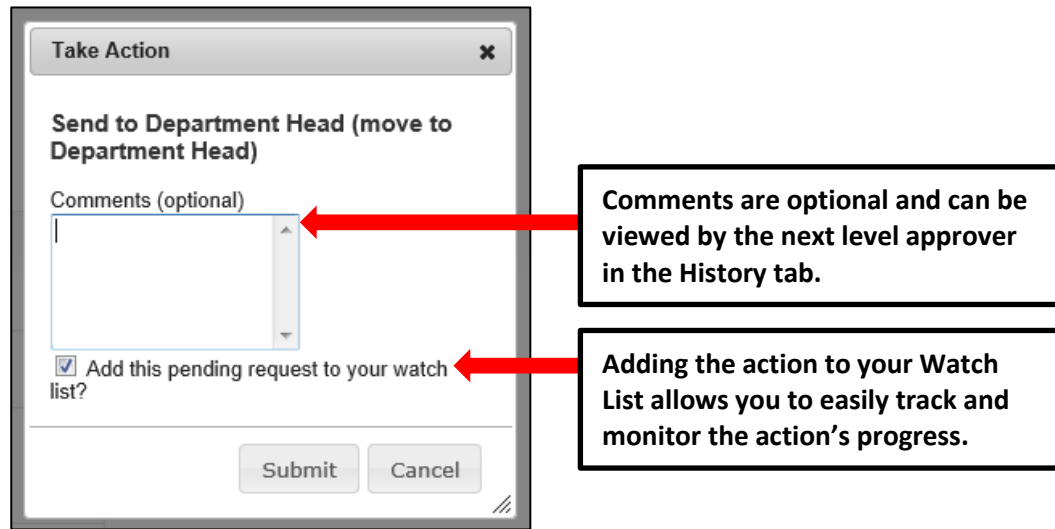
**Summary** | History | Settings | Hiring Proposals

Please review the details of the posting carefully before continuing.

To take the action, select the appropriate **Workflow Action** by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your **Watch List** in the popup box that appears. When you are ready to submit your posting, click on the **Submit** button on the popup box.

**Click on "Take Action On Pending Request", then make appropriate selection to move the request to the next step in the approval workflow.**

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:



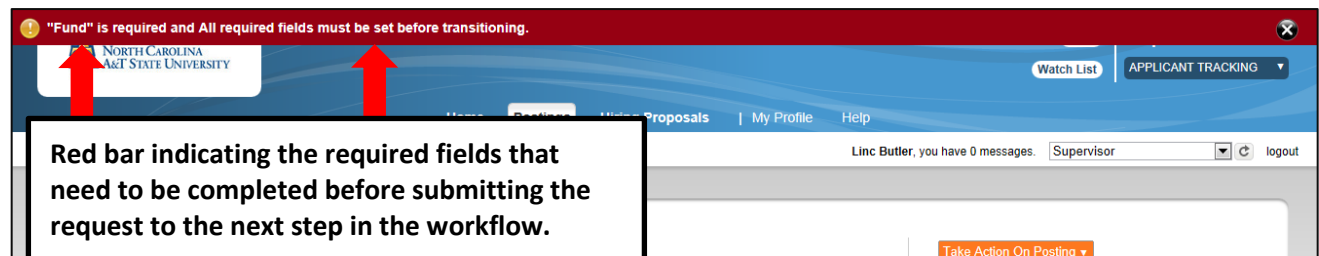
The screenshot shows a 'Take Action' dialog box with the following elements:

- Title:** Take Action (with a close button 'x')
- Action:** Send to Department Head (move to Department Head)
- Comments (optional):** A text area for entering comments.
- Checkbox:** ☒ Add this pending request to your watch list?
- Buttons:** Submit and Cancel.

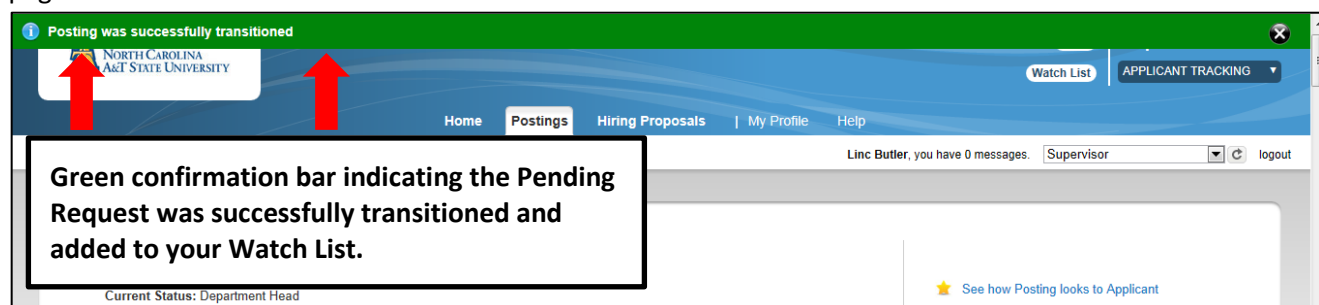
Two red arrows point from text boxes to the form:

- One arrow points to the 'Comments (optional)' text area from a box stating: **Comments are optional and can be viewed by the next level approver in the History tab.**
- Another arrow points to the 'Add this pending request to your watch list?' checkbox from a box stating: **Adding the action to your Watch List allows you to easily track and monitor the action’s progress.**

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:



Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

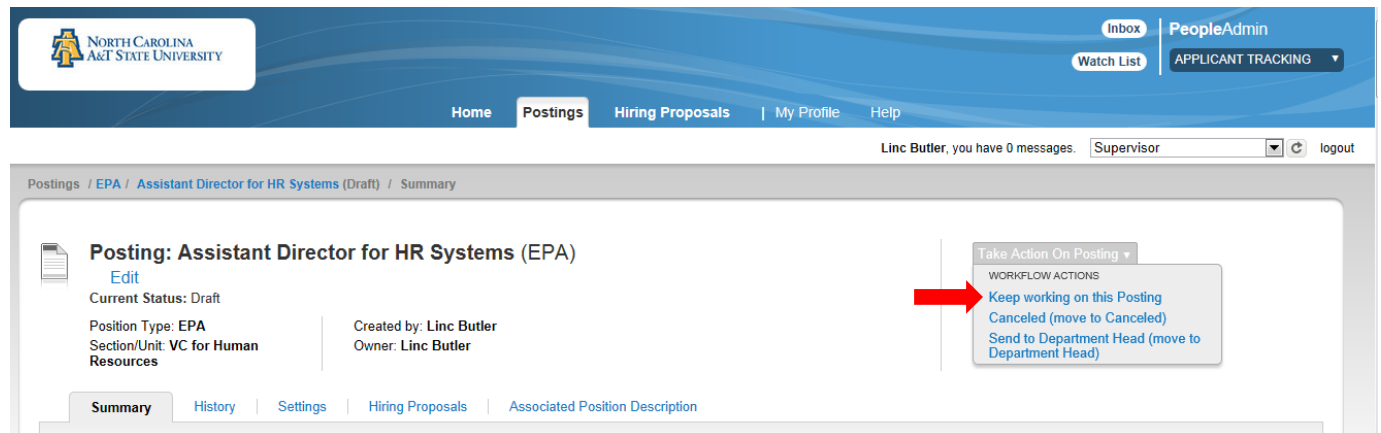


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

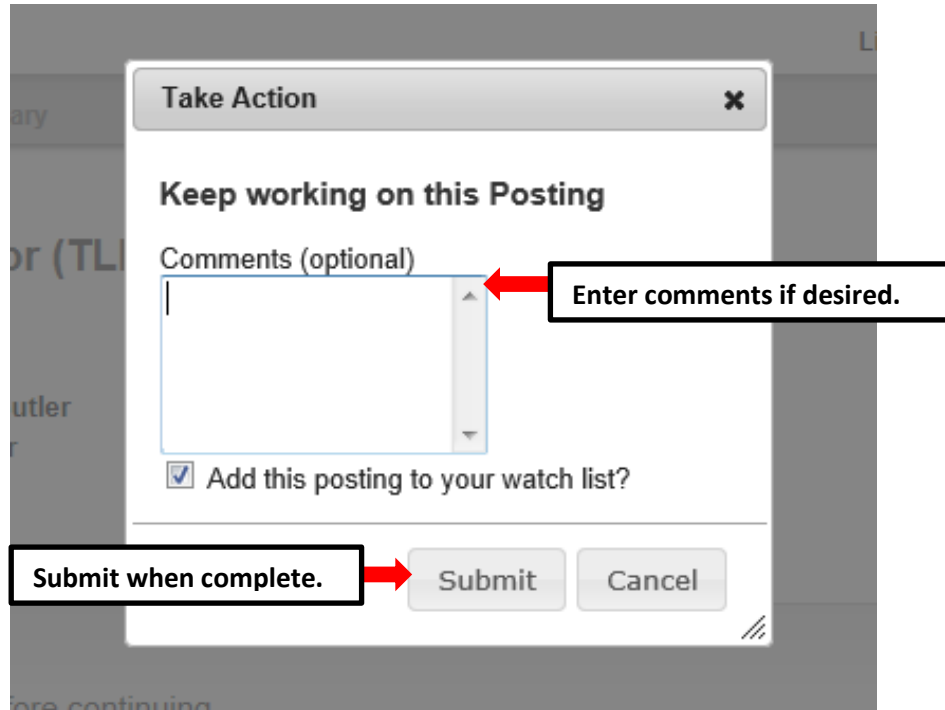
## Create New EHRA Posting from an Existing Posting - Saving to Return to a Pending Request Later

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the “Save” button located in either the top or bottom right corner
- 2) Select “Summary” from the Tab List (illustrated above)
- 3) Select “Keep Working on this Posting”



- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click “Submit”



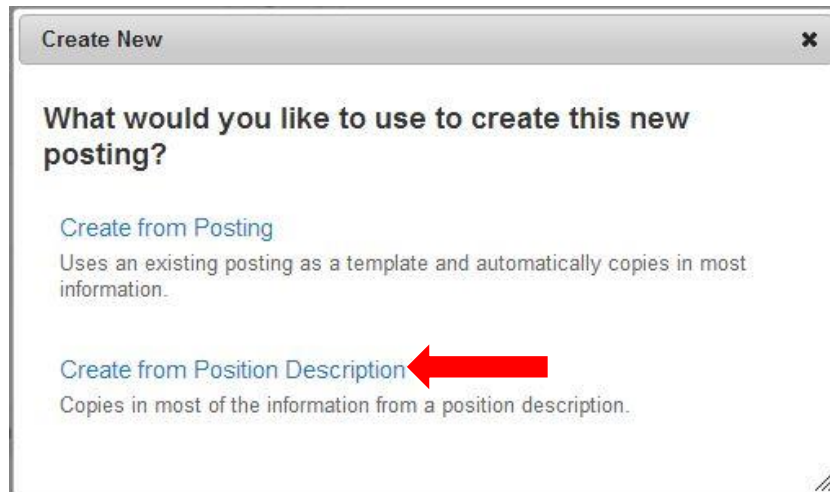
The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on “EHRA” You will then return to the **EHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

## Create New EHRA Posting from a Position Description

Select **Create from Position Description** if you wish to create a posting using information from a position description that has previously been approved in the PeopleAdmin system.

**PLEASE NOTE:** If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Position Description** option copies information from an existing position description into a new posting:



After clicking on **Create from Position Description**, you will be taken to the **EHRA Position Descriptions** view, where you can search position descriptions by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. Searches are fully customizable by position attributes, and you can save custom searches for use again later. If you need assistance in finding the desired position description, please contact the [Classification and Compensation Analyst](#) in the Division of Human Resources:

**Active user type is Supervisor.** → Supervisor [Dropdown]

**Searches are customizable by position attributes and can be saved for later use.** → Search: [Text] [Search] [Hide search options]

**List of current / pending EHRA position descriptions by active user** → [Red Arrow]

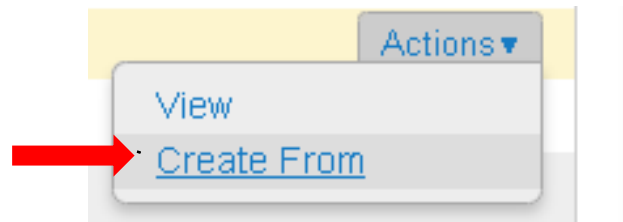
**Actions drop down menu.** → [Red Arrow]

Working Position Title	Position Number	Employee First Name	Employee Last Name	Position/Classification Title	Department	Supervisor	Status	(Actions)
Asst VC-Human Resources	000127	Linc	Butler	Asst VC-Human Resources	VC for Human Resources	VC for Human Resources (Linda McAbee)	Active	Actions
Budget Manager	000080	Shirley	Hines	Budget Manager	Research Administration	Assoc Dean for Research (Shirley Hyman-Parker)	Active	Actions
Program Coordinator	009102	Benjamin	Forbes	Program Coordinator	Agricultural Research	Assoc Dean for Research (Shirley Hyman-Parker)	Active	Actions
Assoc Dean for Research	009202	Shirley	Hyman-Parker	Assoc Dean for Research	Agricultural Research	Administrative Support Assoc (Sheila Eaves)	Active	Actions

Once you locate the position description you wish to create from, you can select it by moving your cursor over that position description's corresponding **Actions** drop down menu located in the far right column, and clicking on **Create From**. This drop down menu will also give you the option of **View** if you wish to



view the information associated with a particular position description prior to selecting **Create From**:



By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange **Create New Posting** button to begin updating posting information:

A screenshot of the 'New Posting' form in a web application. The form has several sections: 'Required Information' with 'Position Title' (Assistant Director for HR Systems), 'Organizational Unit' with 'Division/School/College' (VC for Human Resources), 'Department' (VC for Human Resources), and 'Section/Unit' (VC for Human Resources). There is also an 'Online Applications' section with a checkbox for 'Accept online applications?' and a text area for 'Special offline application instructions'. Two red arrows point to the 'Create New Posting' button at the top right and bottom right of the form. A third red arrow points to the 'Special offline application instructions' field. A fourth red arrow points to the 'VC for Human Resources' text in the 'Organizational Unit' section.

After clicking on the “**Create New Posting**” button, you will then be taken to the **Posting Details** tab, the first information tab that must be completed before the new **EHRA Posting** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Posting** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while the others will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the **Next >>** button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the “**Save**” button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the new **EHRA Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields:

**Tab list**

**Blue Check Circle**

**Save and Next buttons.**

**Required Field**

**Posting Details**

Check spelling

To create a Posting, first complete the information on this screen, then click the **Next** button or select the page in the left hand navigation menu. Proceed through all sections completing all necessary information. To submit the Posting to the next approval step, you must go to the **Posting Summary Page** by clicking on the **Next** button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options.

\* Required Information

Classification Information

HELP TEXT: If the details below are incorrect, please make the appropriate Classification selection using the "Classification" Tab on the left side menu while modifying the Position.

Position/Classification Title	Assistant Director
Job Code	82229
Classification Type	EPA
Salary Range	<input type="text"/> This field is required.

Enter salary to be advertised amount or a description such as "commensurate with education and experience"

## Create New EHRA Posting from a Position Description – Posting Details Tab

Since you are creating a new **EHRA Posting** from an approved position description, many of the fields will already be filled in with information copied from the position description. Follow the instructions at the top of the page to complete any remaining required fields, then click the **Next >>** button to save changes and navigate to the next tab:

**Save and Next buttons.**

**Posting Details**

Check spelling

To create a Posting, first complete the information on this screen, then click the **Next** button or select the page in the left hand navigation menu. Proceed through all sections completing all necessary information. To submit the Posting to the next approval step, you must go to the **Posting Summary Page** by clicking on the **Next** button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options.

\* Required Information

Classification Information

HELP TEXT: If the details below are incorrect, please make the appropriate Classification selection using the "Classification" Tab on the left side menu while modifying the Position.

Position/Classification Title	Assistant Director
Job Code	82229
Classification Type	EPA
Salary Range	<input type="text"/> This field is required.

Enter salary to be advertised amount or a description such as "commensurate with education and experience"

**Fields from the approved position description will be copied in to your new posting.**

**Enter a hiring range if desired.**

Position Overview	
Primary Purpose of Position	Test
Primary Function of Organizational Unit	Test

**Position Overview and Position Information:**  
 Continue to enter posting information into any empty fields as needed.

Position Information	
* Position Title	Assistant Director for HR Systems
* Working Title	<input type="text"/> This field is required.
Position Number	TLB30
* JCAT	12345
Approved Salary	\$60,000
* FLSA	Exempt
* Appointment Type	Permanent - Full-time
* Tenure Track	<input type="text" value="Please select"/> This field is required.
FTE	
* If Time Limited, Appointment Length	<small>If time limited, please indicate budget end date. If funded from more than one fund, indicate earliest end date. This field cannot be left blank if the "Time Limited" field above is checked selected.</small>

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for EHRA positions is thirty (30) calendar days, however, an EHRA posting can be posted as open until filled. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff:

Posting Detail Information

\* **Supervisor** Select Some Options This field is required

\* **Applicant Reviewer** Select Some Options This field is required

**Posting Number**

\* **Open Date**  This field is required.

**Date desired for closing or initial review (minimum 30 days).**

**Close Date**

**Open Until Filled** No

\* **Special Instructions to Applicant**This field is required.

\* **Fast Find Information** Please select ▼ This field is required.

**Supervisor and / or Applicant Reviewer access to the posting.**

---

**Minimum allowable posting period is thirty (30) calendar days. Posting can also be open until filled.**

---

**Select the most appropriate Fast Find category for the posting.**

Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the Next >> button to save your changes and move to the next tab. You can also click the “Save” button if you wish to save your changes and keep working on the current tab.

**Advertising Summary**

Please list additional external advertising sources if different than standard advertising sources.

Standard sources include: NC Employment Security Commission & UNC General Administration

\* **Pass Message**

Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.

\* **Fail Message**

Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.

**Include any special advertising request information.**

---

**Save and Next buttons.**

Save
Next >>

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## Create New EHRA Posting from a Position Description – Position Funding Information Tab

In the Budget Advisory Approval section of this tab, state what mission specific, essential, and / or key objectives will not be met if the position is not filled. All recruitment of permanent EHRA and SHRA positions that are funded in whole or in part by **general state funds** requires approval by the University's Budget Advisory Committee:

Position Funding Information

Save << Prev Next >>

Check spelling

\* Required Information

Budget Advisory Approval

All recruitment of permanent EPA and SPA positions that are funded in whole or in part by general state funds requires approval by the University's Budget Advisory Committee. To receive consideration of the Committee's review process, state what mission specific, essential, and / or key objectives will not be met if the position is not filled.

Mission Specific, Essential and/or Key Objectives not Met without position

Test

Funding Source Details

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

State what mission specific, essential, and/or key objectives will not be met if position is not filled.

Funding Source information from prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

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.

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. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **Next >>** to move to the next tab:

**Funding Source Details**

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.

**\* State Appropriated Funding / Non-State Appropriated Funding**  
 State Appropriated Funding:   
 If non-state, select source of funding:   
 If other, designate source:

**\* Budget Code**  
  
Format: 6 digit number #####

**\* Fund**  
  
Format: 5 digit number #####

**\* Org**  
  
Format: 5 digit number #####

**\* Account**  
  
Format: 5 digit number #####

**\* Program**  
  
Format: 3 digit number ###

**Date Funds End**

**\* Annual Amount**

**\* Percentage of FTE**

☐ Remove Entry?

[Add Funding Source Details Entry](#)

**Funding information will be copied in from the approved position description, which you can edit as necessary.**

**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.**

**IMPORTANT NOTE:**  
Remember to click "Save" after each funding source is entered.

[Save](#) [<< Prev](#) [Next >>](#)

## Create New EHRA Posting from a Position Description – Supplemental Questions Tab

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Once [Next >>](#), click on the [Save](#) button to save changes and proceed to the next tab:

Postings / EPA / Assistant Director for HR Systems (Draft) / Edit: Supplemental Questions

**Editing Posting**

- [Posting Details](#)
- [Position Funding Infor...](#)
- [Supplemental Questions](#)**
- [Applicant Documents](#)
- [References/Letters of ...](#)
- [Search Committee](#)
- [Ranking Criteria](#)
- [Posting Documents](#)
- [Summary](#)

**Supplemental Questions** [Save](#) [<< Prev](#) [Next >>](#)

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

Adding Existing Posting 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.

Submitting New Posting Questions: To submit a new question for review and approval, click on the button labeled "Add a Question". When the Available Supplemental Questions box opens, click on the "Add a New One" link in the bottom right hand corner.

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.

**Included Supplemental Questions**

Position	Required	Category	Question	Status
<div style="border: 2px solid black; padding: 5px; display: inline-block;"> <b>Click to add supplemental questions.</b> </div> <a href="#">Add a question</a>				

[Save](#) [<< Prev](#) [Next >>](#)

**Adding Existing Posting 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. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the **"Add a New One"** link in the bottom right hand corner.

Add a Question

Available Supplemental Questions

Category: Any Keyword:

Add	Category	Question
<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?
<input type="checkbox"/>	Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?
<input type="checkbox"/>	Education	Do you have a high school diploma or equivalent?
<input type="checkbox"/>	Experience	Do you have HR experience?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Experience	How many years of Accounting experience do you have in a higher education setting?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Experience	Do you have at least 4 years of experience?

Displaying all 10

Can't find the one you want? [Add a new one](#)

Submit

Cancel

Filter supplemental questions by keyword or category.

Click to submit a custom supplemental question for review and approval.

Click check box to add an existing supplemental question.

Click Submit when finished.

**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.

Included Supplemental Questions

Add a question

Position	Required	Category	Question	Status
1	<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?	active
2	<input type="checkbox"/>	Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?	active
3	<input type="checkbox"/>	Education	Do you have a High School diploma?	active
4	<input type="checkbox"/>	Experience	How many years of Accounting experience do you have in a higher education setting?	active

Reorder questions.

Click to make questions required.

Possible Answers: Predefined Options

Answer	Points	Disqualifying
1. 0 years	<input type="text"/>	<input type="checkbox"/>
2. 1-3 years	<input type="text"/>	<input type="checkbox"/>
3. 4-5 years	<input type="text"/>	<input type="checkbox"/>
4. 5+ years	<input type="text"/>	<input type="checkbox"/>

Assign points to answers.

Click to assign disqualifying answers.

Next >>



## Create New EHRA Posting from a Position Description – Applicant Documents Tab

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the **Next >>** button to save changes and proceed to the next tab:

The screenshot shows the 'Applicant Documents' tab in the 'Editing Posting' interface. A sidebar on the left lists various sections, with 'Applicant Documents' currently selected. The main area contains a table with columns for 'Order', 'Name', 'Included?', and 'Required?'. Below the table, there is a 'Next >>' button. Two callout boxes provide instructions: one points to the 'Included?' column with the text 'Click Included to make uploading a document optional.', and another points to the 'Required?' column with the text 'Click both Included and Required to make uploading a document required.'.

Order	Name	Included?	Required?
1	Resume	<input type="checkbox"/>	<input type="checkbox"/>
2	Cover Letter	<input type="checkbox"/>	<input type="checkbox"/>
3	Curriculum Vitae	<input type="checkbox"/>	<input type="checkbox"/>
4	Teaching Philosophy	<input type="checkbox"/>	<input type="checkbox"/>
5	Letter Of Reference 1	<input type="checkbox"/>	<input type="checkbox"/>
6	Letter Of Reference 2	<input type="checkbox"/>	<input type="checkbox"/>
7	Letter Of Reference 3	<input type="checkbox"/>	<input type="checkbox"/>

## Create New EHRA Posting from a Position Description – References / Letters of Recommendation Tab

In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted:

The screenshot shows the 'References/Letters of Recommendation' tab in the 'Editing Posting' interface. A sidebar on the left lists various sections, with 'References/Letters of ...' currently selected. The main area contains a 'References/Letters of Recommendation' section with a 'Check spelling' dropdown. Below this, there are instructions for 'Accept References', 'Minimum Requests', 'Maximum Requests', and 'Cutoff Date'. A 'Required Information' section follows, containing a 'References/Letters of Recommendation' dropdown and a 'No' button. Three callout boxes provide instructions: one points to the 'No' button with the text 'Indicate Yes or No.', another points to the 'Minimum Requests' and 'Maximum Requests' fields with the text 'Recommended range is 3 to 5.', and a third points to the 'Cutoff Date' field with the text 'Reference information may not be submitted after this date.'.

**References/Letters of Recommendation**

Check spelling

**Accept References:** Please indicate whether or not you wish to require applicants to submit references with their application.

**Minimum Requests:** Please indicate the minimum number of references you would like applicants to submit.

**Maximum Requests:** Please indicate the maximum number of references you would like applicants to submit.

**Cutoff Date:** Please indicate the date by which reference information must be submitted.

\* Required Information

References/Letters of Recommendation

\* Accept References  Indicate Yes or No.

Minimum Requests

Maximum Requests

Cutoff Date

Recommended range is 3 to 5.

Reference information may not be submitted after this date.

## Create New EHRA Posting from a Position Description – Search Committee Tab

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of Human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

Postings / EPA / Assistant Director for HR Systems (Draft) / Edit: Search Committee

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References/Letters of ...
- Search Committee**
- Ranking Criteria
- Posting Documents
- Summary

**Search Committee**

Save << Prev Next >>

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

**Search Committee Members**

No Search Committee Members have been assigned to this Posting yet.

**Search**

Find a User to assign as a Search Committee Member.

First Name

Last Name

Email Address

**To search for a pre-approved search committee member, enter the name and click the Search button.**

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

**Search Committee Members**

No Search Committee Members have been assigned to this Posting yet.

**Search**

Find a User to assign as a Search Committee Member.

Name	Email Address	Add Member	
Lonnie Crotts	emailaddress@zed.zed	<input type="button" value="Add Member"/>	<input type="checkbox"/> Make Member The Committee Chair

**Click the check box to assign the search committee member as the committee chair.**

First Name

Last Name

Email Address

**Click the Add Member button to add the search committee member you searched for.**

To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

### New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (\*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

\*

First Name

\*

Last Name

\*

Email

\*

Username

Submit

To create an account for a new search committee member, complete the fields and click submit.

<< Prev

Next >>

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

Matching User

Username

ambraun

First Name

Amy

Last Name

Braun

Email

emailaddress@zed.zed

Preferred Group

Employee

Add User

Click the Add User button to add the new search committee member in a pending status. Access will be reviewed and approved by DHR.

Clear Matching Users

### New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (\*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

\*

First Name

Amy

\*

Last Name

Braun

\*

Email

ambraun@ncat.edu

\*

Username

ambraun

Submit

Save

<< Prev

Next >>

## Create New EHRA Posting from a Position Description – Ranking Criteria Tab

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

The screenshot shows the 'Ranking Criteria' tab within the 'Editing Posting' interface. The left sidebar lists various sections, with 'Ranking Criteria' selected. The main content area has a title 'Ranking Criteria' and a 'Save' button. Below the title, there is explanatory text about the tool. A table titled 'Included Evaluative Criteria' has columns for 'Category', 'Description', and 'Status'. An 'Add a Criterion' button is visible in the top right. A callout box with an arrow points to this button, stating 'Click to add ranking criteria.'

To add ranking criteria, click on the button labeled **“Add a Criterion”**. A dialog box will appear where you can add an existing criterion by checking the box in the **“Add”** column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **“Add a Criterion,”** then click on the **“Add a new one”** link in the bottom right hand corner of the dialog box that opens:

The screenshot shows the 'Add a Ranking Criterion' dialog box. It has a title bar with a close button. The main section is titled 'Available Evaluative Criteria'. It includes a 'Category' dropdown menu set to 'Any' and a 'Keyword' search field. A callout box with an arrow points to the search field, stating 'Search for ranking criteria by keyword or category.' Below the search fields is a table with columns 'Add', 'Category', and 'Description'. The first row has an unchecked checkbox, 'Uncategorized', and the description 'Rank Experience - 5 is the highest'. Below the table, there is a 'Possible Answers' list (1. 1, 2. 2, 3. 3, 4. 4, 5. 5) and an 'Applicant workflow state' dropdown menu set to 'Under Review by HR'. A callout box with an arrow points to this dropdown, stating 'Indicate the applicant workflow state that allows an applicant to be ranked.' At the bottom of the table, there are two more rows, each with an unchecked checkbox and a description. A callout box with an arrow points to the first checkbox, stating 'Click check box to add an existing ranking criterion.' Below the table, there is a 'Displaying all 3' label. At the bottom right, there is a link 'Can't find the one you want? Add a new one'. A callout box with an arrow points to this link, stating 'Click to submit a custom ranking criterion for review and approval.' At the very bottom, there are 'Submit' and 'Cancel' buttons. A callout box with an arrow points to the 'Submit' button, stating 'Click Submit when finished.'

Postings / EPA / Assistant Director for HR Systems (Draft) / Edit: Ranking Criteria

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References/Letters of ...
- Search Committee
- Ranking Criteria**
- Posting Documents
- Summary

### Ranking Criteria

Ranking Criteria can be used by search committees to help identify the most qualified candidates based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant.

Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval.

Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled "Add a Criterion". When the Available Evaluative Criteria box opens, click on the "Add a new one" link in the bottom right hand corner.

**Included Evaluative Criteria**

Category	Description	Weight	Workflow State	Status
Uncategorized	Teaching experience in a university		Under Review by HR	active
Uncategorized	Please rate the candidates experience related to the job:		Under Review by HR	active
Uncategorized	Rank Experience - 5 is the highest		Under Review by HR	active

Save << Prev Next >>

Click Save or Next to move to the next tab.

## Create New EHRA Posting from a Position Description – Posting Documents Tab

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting 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.

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

Home Postings Hiring Proposals My Profile Help

Linc Butler, you have 0 messages. Supervisor logout

Postings / EPA / Assistant Director for HR Systems (Draft) / Edit: Posting Documents

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References/Letters of ...
- Search Committee
- Ranking Criteria
- Posting Documents**
- Summary

### Posting Documents

To add a document to the posting, hover over the blue Action text link to the right of the document name.

Documents can be uploaded by browsing for the document or a document can be written or previously selected. Document types that are supported as attachment include .doc, .docx, .pdf, .rtf, .xls, .xlsx, .ppt, .pptx, .png, .jpg, .gif, .bmp, .tiff, .eps, .ai, .indd, .psd, .raw, .dng, .nef, .cr2, .cr3, .cr4, .cr5, .cr6, .cr7, .cr8, .cr9, .cr10, .cr11, .cr12, .cr13, .cr14, .cr15, .cr16, .cr17, .cr18, .cr19, .cr20, .cr21, .cr22, .cr23, .cr24, .cr25, .cr26, .cr27, .cr28, .cr29, .cr30, .cr31, .cr32, .cr33, .cr34, .cr35, .cr36, .cr37, .cr38, .cr39, .cr40, .cr41, .cr42, .cr43, .cr44, .cr45, .cr46, .cr47, .cr48, .cr49, .cr50, .cr51, .cr52, .cr53, .cr54, .cr55, .cr56, .cr57, .cr58, .cr59, .cr60, .cr61, .cr62, .cr63, .cr64, .cr65, .cr66, .cr67, .cr68, .cr69, .cr70, .cr71, .cr72, .cr73, .cr74, .cr75, .cr76, .cr77, .cr78, .cr79, .cr80, .cr81, .cr82, .cr83, .cr84, .cr85, .cr86, .cr87, .cr88, .cr89, .cr90, .cr91, .cr92, .cr93, .cr94, .cr95, .cr96, .cr97, .cr98, .cr99, .cr100.

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

Document Type	Name	Status	(Actions)
Marketing Plan			Actions
Print Ad Text			Upload New Create New Choose Existing

Save << Prev Next >>

Click "Actions", then select Upload New, Create New, or Choose Existing in order to upload an attachment.

Complete this page by clicking on Save and Next>>

## Create New EHRA Posting from a Position Description – Summary Tab

The **Summary Tab** allows you to perform a final review all of the posting 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 posting summary carefully before continuing.

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

Postings / EPA / Assistant Director for HR Systems (Draft) / Summary

**Posting: Assistant Director for HR Systems (EPA)**  
[Edit](#)  
 Current Status: Draft  
 Position Type: EPA  
 Section/Unit: VC for Human Resources  
 Created by: Linc Butler  
 Owner: Linc Butler



[Take Action On Posting](#)  
[See how Posting looks to Applicant](#)  
[Print Preview \(Applicant View\)](#)  
[Print Preview](#)

**Summary** | History | Settings | Hiring Proposals | Associated Position Description

Please review the details of the posting carefully before continuing.

To take the action, select the appropriate **Workflow Action** by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your **Watch List** in the popup box that appears. When you are ready to submit your posting, click on the **Submit** button on the popup box.

To edit the posting, click on the **Edit** link next to the **Section Name** in the **Summary Section**. This will take you directly to the **Posting Page to Edit**. If a section has an orange icon with an exclamation point, you will need to review this section and make necessary corrections before moving to the next step in the workflow.

 **Posting Details** [Edit](#) 

**Classification Information**  
 HELP TEXT: If the details below are incorrect, please click the "Edit" link in the menu while modifying the Position.

Assistant Director	
82229	
Classification Type	EPA
Salary Range	\$55,000 - \$60,000
Minimum Experience/Education	

**Blue Circle Check**

**Click "Edit" to make edits to a tab.**

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 **Summary Tab** by clicking on the link in the left column:

 **Position Funding Information** [Edit](#) 

**Budget Advisory Approval**


EPA and SPA positions that are funded in whole or in part by general state funds requires approval by A&T's Budget Advisory. Consideration of the Committee's review process, state below what mission specific, essential, and / or key objectives will not be met if the

Mission Specific, Essential and/or Key Objectives not Met without position	Test
--	------

**Orange Circle Exclamation Point**



**Click "Edit" to make edits to a tab.**

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)"**:

 **North Carolina A&T State University**

Inbox | PeopleAdmin  
 Watch List | **APPLICANT TRACKING**

Home | **Postings** | Hiring Proposals | My Profile | Help

Linc Butler, you have 0 messages. Supervisor   [logout](#)

Postings / EPA / Assistant Director for HR Systems (Draft) / Summary

**Posting: Assistant Director for HR Systems (EPA)**  
[Edit](#)  
 Current Status: Draft  
 Position Type: EPA  
 Section/Unit: VC for Human Resources  
 Created by: Linc Butler  
 Owner: Linc Butler

**Summary** | History | Settings | Hiring Proposals

Please review the details of the posting carefully before continuing.

To take the action, select the appropriate **Workflow Action** by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your **Watch List** in the popup box that appears. When you are ready to submit your posting, click on the **Submit** button on the popup box.

**Click on "Take Action On Pending Request", then select "Send to Department Head" to move the request to the next step in the approval workflow.**

**Take Action On Posting**  
 WORKFLOW ACTIONS  
[Keep working on this Posting](#)  
[Canceled \(move to Canceled\)](#)  
[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:

**Take Action**

Send to Department Head (move to Department Head)

Comments (optional)

☒ Add this pending request to your watch list?

Submit Cancel

Comments are optional and can be viewed by the next level approver in the History tab.

Adding the action to your Watch List allows you to easily track and monitor the action’s progress.

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

! "Fund" is required and All required fields must be set before transitioning.

Red bar indicating the required fields that need to be completed before submitting the request to the next step in the workflow.

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

! Posting was successfully transitioned

Green confirmation bar indicating the Pending Request was successfully transitioned and added to your Watch List.

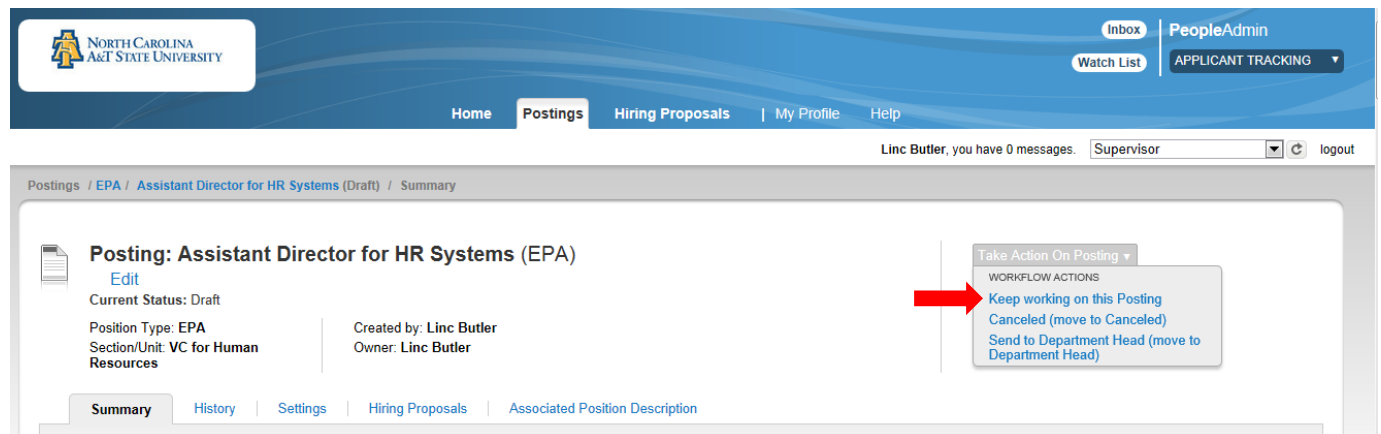
The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## [Create New EHRA Posting from a Position Description - Saving to Return to a Pending Request Later](#)

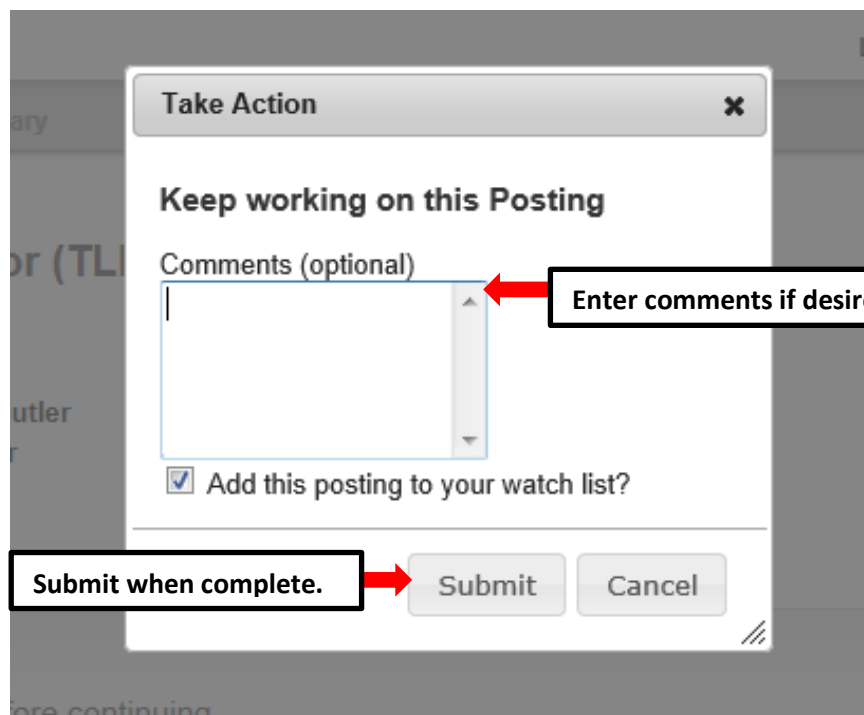
On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.



- 1) Click the “Save” button located in either the top or bottom right corner
- 2) Select “Summary” from the Tab List (illustrated above)
- 3) Select “Keep Working on this Posting”



- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click “Submit”



The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on “EHRA” You will then return to the **EHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

## Create New Post Doctoral Posting

To initiate a **Create New Post Doctoral Posting** request, hover your cursor over the **Postings** tab and click on "Post Doctoral", or click on the **Create New Post Doctoral Posting** link located in the **Shortcuts** menu to the right of your **Inbox**:

Hover cursor over Postings tab and click on Post Doctoral.

Or click on Create New Post Doctoral Posting in the Shortcuts

You will then be taken to the **EHRA Postings** view, which provides a list of all current/pending EHRA postings initiated based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Current / pending postings for positions that are direct reports to the Supervisor only.
Department Head	Current / pending postings for all positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	Current / pending postings for all positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

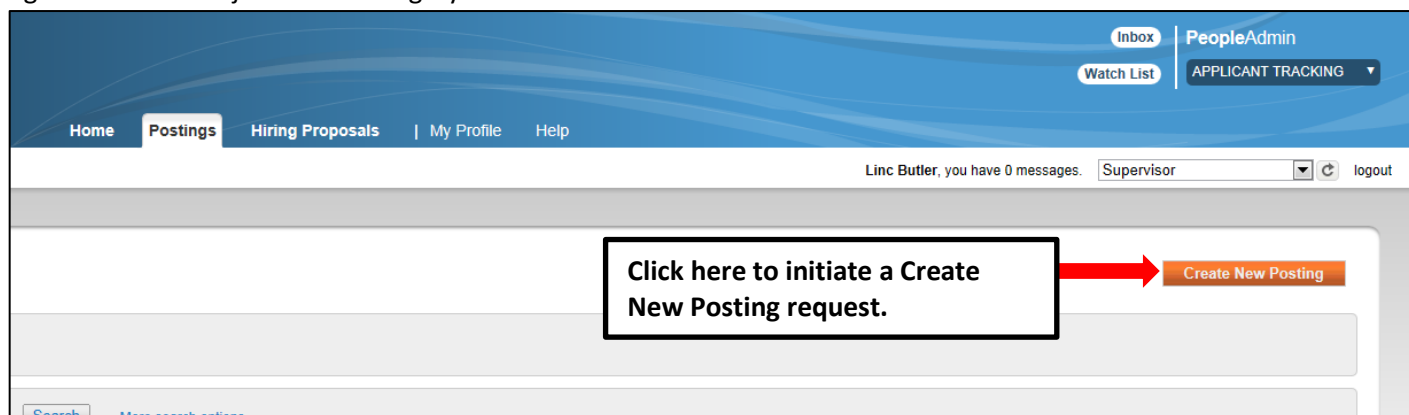
In the **EHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later:

Active user type is Supervisor.

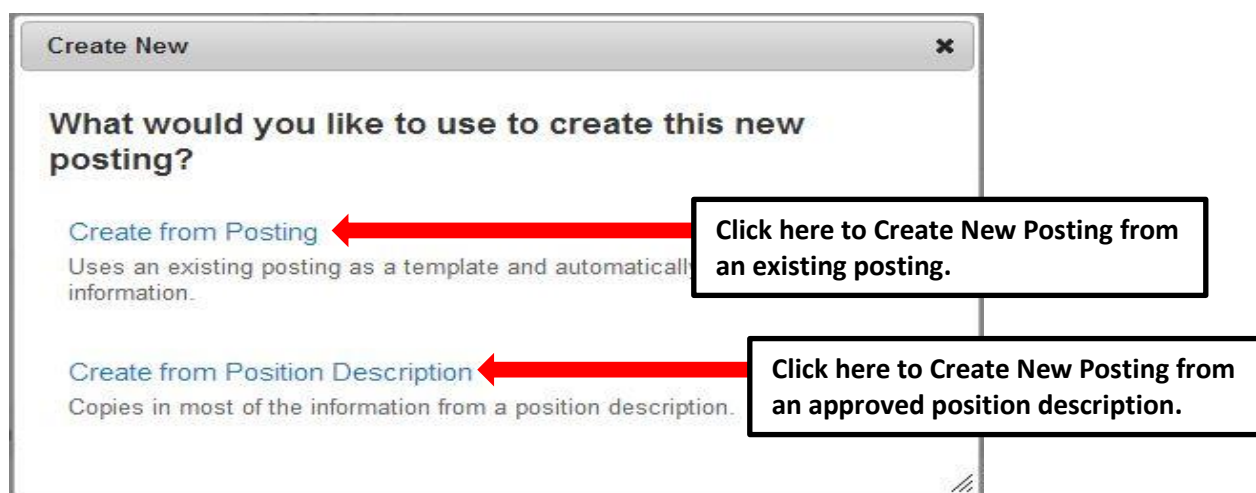
Searches are customizable by position attributes and can be saved for later use.

List of current / pending EHRA postings by active user type.

To initiate the request, click on the orange **Create New Position Description** button located on the top right of the screen just below the grey bar:



You will then see the **Create New** menu, asking what you would like to use to create the new posting:

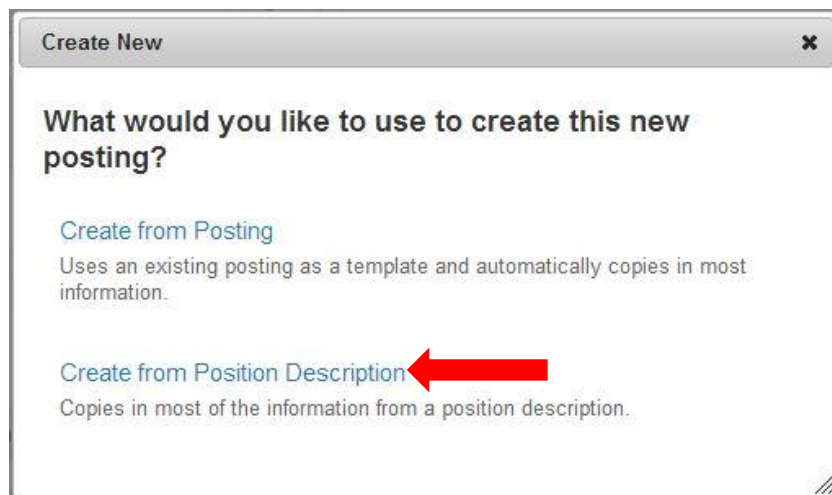


## [Create New Post Doctoral Posting from an Existing Posting](#)

Select **Create from Posting** if you wish to create a posting using information from a prior posting that has previously been used in the PeopleAdmin system.

**PLEASE NOTE:** If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Posting** option copies information from a prior posting into a new posting:



After clicking on **Create from Posting**, you will be taken to the **Post Doctoral Postings** view, where you can search any current or pending postings by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. Searches are fully customizable by position attributes, and you can save custom searches for use again later. If you need assistance in finding the desired posting, please contact the [Classification and Compensation Analyst](#) in the Division of Human Resources:

Active user type is Supervisor.

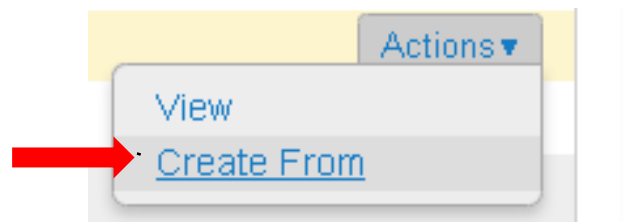
Searches are customizable by position attributes and can be saved for later use.

Actions drop down menu.

List of current / pending Post Doctoral postings by active user type.

Position Title	Posting Number	Department	Active Applications	Workflow State	(Actions)
Post Doctoral Research Associate (TLB40)		VC for Human Resources	0	Closed	Actions

Once you locate the posting you wish to create from, you can select it by moving your cursor over that posting's corresponding **Actions** drop down menu located in the far right column and clicking on **Create From**. This drop down menu will also give you the option of **View** if you wish to view the information associated with a particular position description prior to selecting **Create From**:



By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange **Create New Posting** button to begin updating posting information:

The screenshot shows the 'New Posting' form with the following sections and annotations:

- Position Title:** Post Doctoral Research Associate (TLB40)
- Organizational Unit:**
  - Division/School/College: VC for Human Resources
  - Department: VC for Human Resources
  - Section/Unit: VC for Human Resources
- Online Applications:**
  - ☒ Accept online applications?
  - Special offline application instructions: (Empty text box)

Annotations with red arrows:

- Create new posting button.** Points to the 'Create New Posting' button in the top right corner.
- Confirm Organizational Unit information.** Points to the 'VC for Human Resources' text in the Organizational Unit section.
- Include special offline application instructions if necessary.** Points to the 'Special offline application instructions' text box.
- Create new posting button.** Points to the 'Create New Posting' button in the bottom right corner.

After clicking on the **“Create New Posting”** button, you will then be taken to the **Posting Details** tab, the first information tab that must be completed before the new **Post Doctoral Posting** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Posting** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the **Next >>** button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the **“Save”** button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the new **Post Doctoral Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields:

The screenshot shows the 'Posting Details' form with the following sections and annotations:

- Tab list:** A list of tabs on the left side of the page, including 'Posting Details', 'Position Funding Infor...', 'Supplemental Questions', 'Applicant Documents', 'References', 'Search Committee', 'Ranking Criteria', 'Posting Documents', and 'Summary'. The 'Posting Details' tab is highlighted with a blue check circle.
- Posting Details:**
  - Check spelling:** A green checkmark icon and a dropdown menu.
  - Required Information:**
    - Classification Information:**
      - Position/Classification Title: Post Doc Research Associate
      - Job Code: 81069
      - Classification Type: Post Doctoral
      - Minimum Experience/Education: (Empty text box)
- Save and Next buttons:** Points to the 'Save' and 'Next >>' buttons in the top right corner.
- Blue Check Circle:** Points to the blue check circle next to the 'Posting Details' tab in the tab list.

## Create New Post Doctoral Posting from an Existing Posting – Posting Details Tab

Since you are creating a new **Post Doctoral Posting** from a prior posting, many of the fields will already be filled in with information copied from the prior posting. Follow the instructions at the top of the page to complete any remaining required fields, then click the **Next >>** button to save changes and navigate to the next tab:

**Editing Posting**

**Posting Details**

- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

**Posting Details**

[Check spelling](#)

To create a Posting, first complete the information on this screen, then click the **Next** button or select the page in the left hand navigation menu. Proceed through all sections completing all necessary information. To submit the Posting to Human Resources, you must go to the **Posting Summary Page** by clicking on the **Next** button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options.

**\* Required Information**

**Classification Information**

HELP TEXT: If the details below are incorrect, please make the appropriate Classification selection using the "Classification" Tab on the left side menu while modifying the Position.

Position/Classification Title	Post Doc Research Associate
Job Code	81069
Classification Type	Post Doctoral
Minimum Experience/Education	

**Save and Next buttons.**

**Fields from the prior posting will be copied in to your new posting.**

**Position Overview**

Primary Purpose of Position	Test
Primary Function of Organizational Unit	Test

**Position Information**

* Position Title	Post Doctoral Research Associate (TLB40)
* Working Title	<input type="text"/> This field is required.
Position Number	999999
* JCAT	12345
Approved Salary	\$40,000
* Salary Range	<input type="text"/> This field is required. <small>Enter salary to be advertised amount or a description such as "commensurate with education and experience"</small>
* FLSA	Exempt
* Appointment Type	Time Limited - Full-time
* If Time Limited, Appointment Length	<input type="text"/> 08/08/2014 <small>Please indicate budget end date. If funded from more than one fund indicate earliest end date. This field cannot be left blank.</small>

FTE

**Position Overview and Position Information: Continue to enter posting information into any empty fields as needed.**

**Required fields will be highlighted in RED.**

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for

Post Doctoral positions is thirty (30) calendar days, however, a Post Doctoral posting can be posted as open until filled. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff:

Posting Detail Information

Supervisor

Select Some Options

This field is required

Applicant Reviewer

Select Some Options

This field is required

Posting Number

Open Date

This field is required

Date desired for closing or initial review ( minimum 30 days).

Close Date

Open Until Filled

No

Special Instructions to Applicant

Fast Find Information

Please select

This field is required

Supervisor and / or Applicant Reviewer access to the posting.

Minimum allowable posting period is thirty (30) calendar days. Posting can also be open until filled.

Select the most appropriate Fast Find category for the posting.

Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the **Next >>** button to save your changes and move to the next tab. You can also click the "Save" button if you wish to save your changes and keep working on the current tab:

Advertising Summary

Please list additional external advertising sources if different than standard advertising sources.

Standard sources include: NC Employment Security Commission & UNC General Administration

Pass Message

Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.

Fail Message

Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.

Save and Next buttons.

Save

Next >>

Include any special advertising request information.

Template applicant e-mail notifications.



## Create New Post Doctoral Posting from an Existing Posting – Position Funding Information Tab

Funding Source information from the prior posting will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

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.

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. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **Next >>** to move to the next tab:

Funding Source Details

Indicate the funding source(s) for this position. Click on “Add Funding Source Details Entry” to enter budget and other required codes. Select “SAVE” after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, continue to select “Add Funding Source Details Entry” and “Save” until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.

State Appropriated Funding / Non-State Appropriated Funding

State Appropriated Funding

If non-state, select source of funding

Please select

If other, designate source

Budget Code

16070 (State)

Fund

111111

Format: 6 digit number #####

Org

11111

Format: 5 digit number #####

Account

11111

Format: 5 digit number #####

Program

111

Format: 3 digit number ###

Date Funds End

Annual Amount

\$45,000

Percentage of FTE

1.0

☐ Remove Entry?

Add Funding Source Details Entry

Funding information will be copied in from the prior posting, which you can edit as necessary.

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.

**IMPORTANT NOTE:**  
Remember to click “Save” after each funding source is entered.

Save

<< Prev

Next >>

172

## Create New Post Doctoral Posting from an Existing Posting – Supplemental Questions Tab

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Once done, click on the **Next >>** button to save changes and proceed to the next tab:

Postings / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Edit: Supplemental Questions

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions**
- Applicant Documents
- References
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

**Supplemental Questions** [Save] << Prev Next >>

Adding New Posting 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 Posting 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.

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.

**Included Supplemental Questions**

Position	Required	Category	Question	Status

Click to add supplemental questions. [Add a question] [Save] << Prev Next >>

**Adding Existing Posting Questions:** There are two ways to search for approved posting questions to add to the job being posted: by key word search or by question category. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the **"Add a New One"** link in the bottom right hand corner.

**Add a Question** [X]

**Available Supplemental Questions**

Category: **Any** Keyword: [ ]

Filter supplemental questions by keyword or category.

Add	Category	Question
<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?
<input type="checkbox"/>	Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?
<input type="checkbox"/>	Education	Do you have a high school diploma or equivalent?
<input type="checkbox"/>	Experience	Do you have HR experience?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Experience	How many years of Accounting experience do you have in a higher education setting?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Experience	Do you have at least 4 years of experience?

Click check box to add an existing supplemental question.

Click to submit a custom supplemental question for review and approval.

Can't find the one you want? [Add a new one](#)

Click Submit when finished. [Submit] [Cancel] 173

**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.

The screenshot shows the 'Included Supplemental Questions' interface. It features a table with columns: Position, Required, Category, Question, and Status. There are four questions listed. Annotations include:
 

- A red arrow pointing to the 'Required' checkbox for question 1, with a box saying 'Click to make questions required.'
- A red arrow pointing to the 'Position' dropdown for question 1, with a box saying 'Reorder questions.'
- A red arrow pointing to the 'Question' text for question 4, with a box saying 'Assign points to answers.'
- A red arrow pointing to the 'Points' and 'Disqualifying' checkboxes for question 4, with a box saying 'Click to assign disqualifying answers.'

 Below the table is a section for 'Possible Answers: Predefined Options' with a table of answers (0 years, 1-3 years, 4-5 years, 5+ years) and checkboxes for points and disqualifying. A 'Next >>' button is at the bottom right.

## Create New Post Doctoral Posting from an Existing Posting – Applicant Documents Tab

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the **Next >>** button to save changes and proceed to the next tab:

The screenshot shows the 'Applicant Documents' tab in the 'Editing Posting' interface. It displays a table with columns: Order, Name, Included?, and Required?. There are seven documents listed: Resume, Cover Letter, Curriculum Vitae, Teaching Philosophy, Letter Of Reference 1, Letter Of Reference 2, and Letter Of Reference 3. Annotations include:
 

- A red arrow pointing to the 'Included?' checkbox for 'Resume', with a box saying 'Click Included to make uploading a document optional.'
- A red arrow pointing to both the 'Included?' and 'Required?' checkboxes for 'Resume', with a box saying 'Click **both** Included **and** Required to make uploading a document required.'

 A 'Next >>' button is at the top right.

## Create New Post Doctoral Posting from an Existing Posting – References / Letters of Recommendation Tab

In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted:

Postings / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Edit: References

**Editing Posting**  
Posting Details  
Position Funding Infor...  
Supplemental Questions  
Applicant Documents  
**References**  
Search Committee  
Ranking Criteria  
Posting Documents  
Summary

### References

Save << Prev Next >>

Check spelling

**Accept References:** Please indicate whether or not you wish to require applicants to submit references with their application.

**Minimum Requests:** Please indicate the minimum number of references you would like applicants to submit.

**Maximum Requests:** Please indicate the maximum number of references you would like applicants to submit.

**Cutoff Date:** Please indicate the date by which reference information must be submitted.

\* Required Information

References

\* Accept References No

Minimum Requests

Maximum Requests

Cutoff Date

Save << Prev Next >>

Reference information may not be submitted after this date.

Indicate Yes or No.

Recommended range is 3 to 5.

## Create New Post Doctoral Posting from an Existing Posting – Search Committee Tab

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

**Editing Posting**  
Position Funding Infor...  
Supplemental Questions  
Applicant Documents  
References/Letters of ...  
**Search Committee**  
Ranking Criteria  
Posting Documents  
Summary

### Search Committee

Save << Prev Next >>

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

**Search Committee Members**

No Search Committee Members have been assigned to this Posting yet.

**Search**

Find a User to assign as a Search Committee Member.

First Name

Last Name

Email Address

Search

To search for a pre-approved search committee member, enter the name and click the Search button.

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **“Make Member the Committee Chair”**:

**Search Committee Members**

No Search Committee Members have been added to this committee.

**Search**

Find a User to assign as a Search Committee Member.

Name	Email Address	Add Member
Lonnie Crotts	emailaddress@zed.zed	<input type="button" value="Add Member"/> <input type="checkbox"/> Make Member The Committee Chair

First Name

Last Name

Email Address

**Click the check box to assign the search committee member as the committee chair.**

**Click the Add Member button to add the search committee member you searched for.**

To create an account for a new search committee member, enter in the committee member’s name, current e-mail address, and desired username, then click on the **Submit** button:

**New Search Committee Member**

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (\*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

\* **First Name**

\* **Last Name**

\* **Email**

\* **Username**

**To create an account for a new search committee member, complete the fields and click submit.**

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

**Matching User**  
**Username** ambraun  
**First Name** Amy  
**Last Name** Braun  
**Email** emailaddress@zed.zed  
**Preferred Group** Employee

Click the Add User button to add the new search committee member in a pending status. Access will be reviewed and approved by DHR.

[Clear Matching Users](#)

### New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (\*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

\* **First Name**

Amy

\* **Last Name**

Braun

\* **Email**

ambraun@ncat.edu

\* **Username**

ambraun

## Create New Post Doctoral Posting from an Existing Posting – Ranking Criteria Tab

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

Editing Posting

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References/Letters of ...
- Search Committee
- Ranking Criteria**
- Posting Documents
- Summary

### Ranking Criteria

Ranking Criteria can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant.

Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval.

Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled "Add a Criterion". When the Available Evaluative Criteria box opens, click on the "Add a new one" link in the bottom right hand corner.

Included Evaluative Criteria		
Category	Description	Status
		<div> <div>Click to add ranking criteria.</div> <input type="button" value="Add a Criterion"/> </div>

To add ranking criteria, click on the button labeled **“Add a Criterion”**. A dialog box will appear where you can add an existing criterion by checking the box in the “Add” column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **“Add a Criterion,”** then click on the **“Add a new one”** link in the bottom right hand corner of the dialog box that opens:

**Add a Ranking Criterion**

Available Evaluative Criteria

Category: Any Keyword:

**Search for ranking criteria by keyword or category.**

Add	Category	Description
<input type="checkbox"/>	Uncategorized	Rank Experience - 5 is the highest
Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5		
Applicant workflow state: <span>Under Review by HR</span>		
<input type="checkbox"/>	Uncategorized	Please rate the candidates experience related to the
<input type="checkbox"/>	Uncategorized	Teaching experience in a university

**Indicate the applicant workflow state that allows an applicant to be ranked.**

**Click to submit a custom ranking criterion for review and approval.**

Can't find the one you want? [Add a new one](#)

**Click check box to add an existing ranking criterion.**

**Click Submit when finished.**

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References/Letters of ...
- Search Committee
- Ranking Criteria**
- Posting Documents
- Summary

**Ranking Criteria**

Ranking Criteria can be used by search c... experience and education factors. This optiona... criteria are not presented to the applicant.

Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval.

Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled "Add a Criterion". When the Available Evaluative Criteria box opens, click on the "Add a new one" link in the bottom right hand corner.

**Included Evaluative Criteria**

Category	Description	Weight	Workflow State	Status
Uncategorized	Teaching experience in a university		Under Review by HR	active
Uncategorized	Please rate the candidates experience related to the job:		Under Review by HR	active
Uncategorized	Rank Experience - 5 is the highest		Under Review by HR	active

**Click Save or Next to move to the next tab.**

## Create New Post Doctoral Posting from an Existing Posting – Posting Documents Tab

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting 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.



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

**Click “Actions”, then select Upload New, Create New, or Choose Existing in order to upload an attachment.**

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

## Create New Post Doctoral Posting from an Existing Posting – Summary Tab

The **Summary Tab** allows you to perform a final review all of the posting 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 posting summary carefully before continuing.

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

**Click “Edit” to make edits to a tab.**

**Blue Circle Check**

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 **Summary Tab** by clicking on the link in the left column:

**Click “Edit” to make edits to a tab.**

**Orange Circle Exclamation Point**

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)”**:

The screenshot shows the PeopleAdmin interface for a 'Post Doctoral Research Associate (TLB40) (Draft)' posting. A callout box points to the 'Take Action On Posting' dropdown menu, which lists three workflow actions: 'Keep working on this Posting', 'Canceled (move to Canceled)', and 'Send to Department Head (move to Department Head)'. The 'Send to Department Head' option is highlighted in blue.

**Click on “Take Action On Pending Request”, then select approver to move the request to the next step in the approval workflow.**

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:

The 'Take Action' dialog box shows the selected action 'Send to Department Head (move to Department Head)'. It includes a 'Comments (optional)' text area, a checkbox for 'Add this pending request to your watch list?' (which is checked), and 'Submit' and 'Cancel' buttons. Two callout boxes provide additional information: one points to the comments field, stating 'Comments are optional and can be viewed by the next level approver in the History tab.', and the other points to the checkbox, stating 'Adding the action to your Watch List allows you to easily track and monitor the action’s progress.'

**Comments are optional and can be viewed by the next level approver in the History tab.**

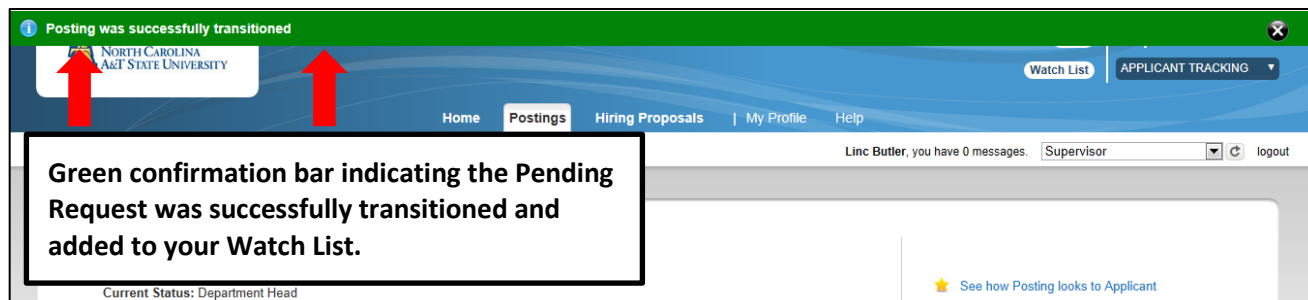
**Adding the action to your Watch List allows you to easily track and monitor the action’s progress.**

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

The screenshot shows a burgundy error bar at the top of the page with the message: '“Fund” is required and All required fields must be set before transitioning.' A callout box points to this bar, stating: 'Red bar indicating the required fields that need to be completed before submitting the request to the next step in the workflow.'

**Red bar indicating the required fields that need to be completed before submitting the request to the next step in the workflow.**

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

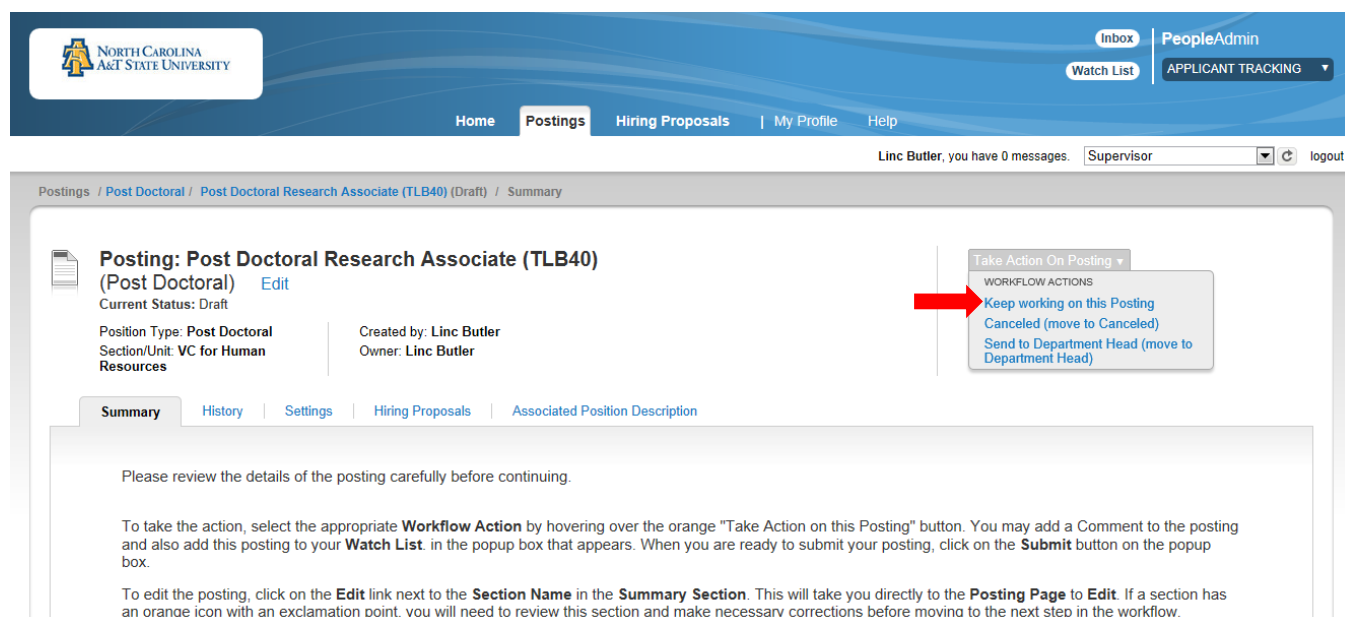


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

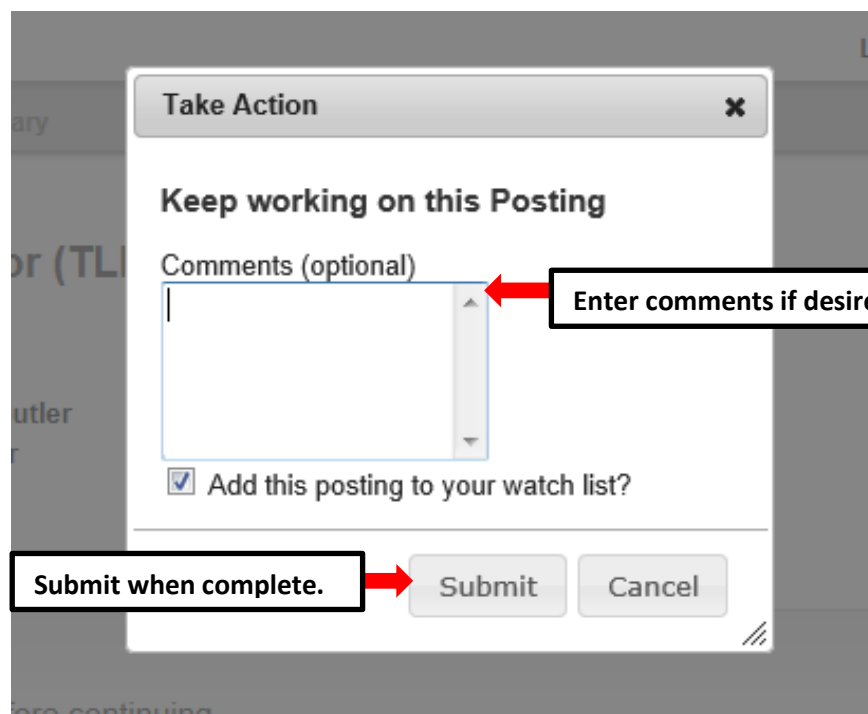
## Create New Post Doctoral Posting from an Existing Posting - Saving to Return to a Pending Request Later

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Posting"



- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click "Submit"



The screenshot shows a 'Take Action' dialog box with a close button (X) in the top right corner. The main heading is 'Keep working on this Posting'. Below this is a section titled 'Comments (optional)' with a text input area. A red arrow points from a callout box 'Enter comments if desired.' to the input area. Below the input area is a checkbox labeled 'Add this posting to your watch list?' which is checked. At the bottom are 'Submit' and 'Cancel' buttons. A red arrow points from a callout box 'Submit when complete.' to the 'Submit' button.

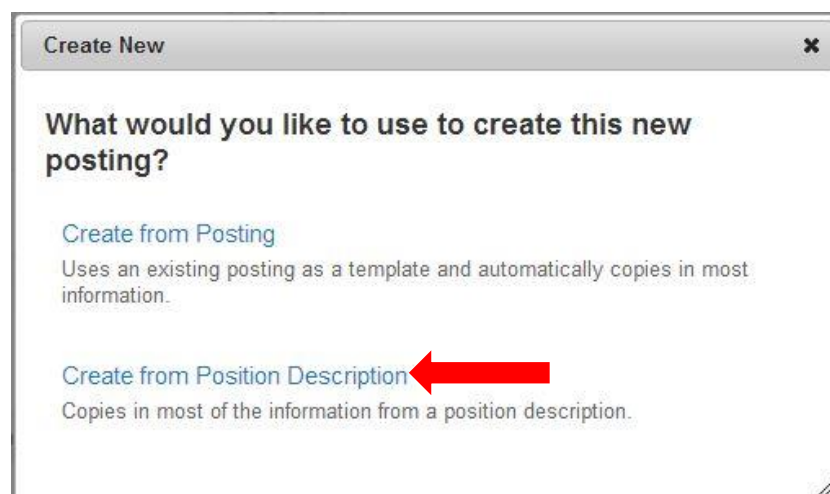
The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on "EHRA" You will then return to the **EHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

## Create New Post Doctoral Posting from a Position Description

Select **Create from Position Description** if you wish to create a posting using information from a position description that has previously been approved in the PeopleAdmin system.

**PLEASE NOTE:** If the position classification and/or the position description details have changed, you must start a Modify Position action in the Position Management module prior to posting the position.

Choosing the **Create from Position Description** option copies information from an existing position description into a new posting:



The screenshot shows a 'Create New' dialog box with a close button (X) in the top right corner. The main heading is 'What would you like to use to create this new posting?'. There are two options listed: 'Create from Posting' with the description 'Uses an existing posting as a template and automatically copies in most information.' and 'Create from Position Description' with the description 'Copies in most of the information from a position description.' A red arrow points to the 'Create from Position Description' option.

After clicking on **Create from Position Description**, you will be taken to the **Post Doctoral Position Descriptions** view, where you can search position descriptions by any number of criteria, including but not limited to position title, posting number, position number, department name, or supervisor name. Searches are fully customizable by position attributes, and you can save custom searches for use again later. If you need assistance in finding the desired position description, please contact the [Classification and Compensation Analyst](#) in the Division of Human Resources:

**Active user type is Supervisor.**

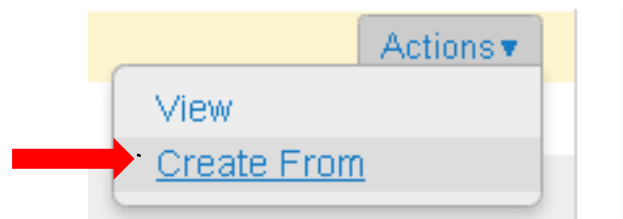
**Searches are customizable by position attributes and can be saved for later use.**

**List of current / pending Post Doctoral position descriptions by active user type.**

**Actions drop down menu.**

Working Position Title	Position Number	Employee First Name	Employee Last Name	Position/Classification Title	Department	Supervisor	Status	(Actions)
Post Doctoral Research Associate	010002			Post Doc Research Associate	Bioenergy Center	Human Resources Consultant (Amy Braun)	Active	Actions
Post Doctoral Research Associate (TLB40)	999999			Post Doc Research Associate	VC for Human Resources	Asst VC-Human Resources (Linc Butler)	Active	Actions

Once you locate the position description you wish to create from, you can select it by moving your cursor over that position description's corresponding **Actions** drop down menu located in the far right column and clicking on **Create From**. This drop down menu will also give you the option of **View** if you wish to view the information associated with a particular position description prior to selecting **Create From**:



By clicking **Create From**, the **New Posting** form will appear. This is where you can update the working title of the position for the purpose of posting, and view **Organizational Unit** information to confirm accuracy. You can also provide **Special Offline Application Instructions** in the field provided if necessary. Once all information is entered and confirmed on the **New Posting** page, click on the orange **Create New Posting** button to begin updating posting information:

The screenshot shows the 'New Posting' form with the following sections and annotations:

- Position Title:** Post Doctoral Research Associate (TLB40)
- Organizational Unit:**
  - Division/School/College: VC for Human Resources
  - Department: VC for Human Resources
  - Section/Unit: VC for Human Resources
- Online Applications:**
  - ☒ Accept online applications?
  - Special offline application instructions: (Empty text area)

Annotations with red arrows:

- Create new posting button.** Points to the 'Create New Posting' button in the top right corner.
- Confirm Organizational Unit information.** Points to the 'VC for Human Resources' text in the Organizational Unit section.
- Include special offline application instructions if necessary.** Points to the 'Special offline application instructions' text area.
- Create new posting button.** Points to the 'Create New Posting' button in the bottom right corner.

After clicking on the **“Create New Posting”** button, you will then be taken to the **Posting Details** tab, the first information tab that must be completed before the new **Post Doctoral Posting** can be sent to the next step in the approval workflow. Each information tab is listed on the **Edit Posting** page in the far left-hand column of the page, and the tab you are actively editing will appear in the list in bold black letters while all other tabs will appear as blue links.

You can save the changes you’ve made to the active tab you’re working on and navigate to the next tab in the list simultaneously by clicking the **Next >>** button located in both the top and bottom right corners of the page. You can save the active tab you’re working on and stay on the same tab by clicking the **“Save”** button also located in both the top and bottom right corners of the page. You can navigate to the other tabs by clicking on the links in the far left-hand column; however, this action **WILL NOT** save any changes made to the tab you are navigating away from.

Required fields are highlighted in **red** and must be filled in before the new **Post Doctoral Posting** can be sent to the next step in the approval workflow. Once all of the required fields on a tab have been filled in and saved, a **Blue Check Circle** will appear beside the tab. The **Blue Check Circle** also appears next to tabs that do not contain any required fields:

The screenshot shows the 'Posting Details' form with the following sections and annotations:

- Tab list:** A list of tabs on the left side of the page, including 'Posting Details', 'Position Funding Infor...', 'Supplemental Questions', 'Applicant Documents', 'References', 'Search Committee', 'Ranking Criteria', 'Posting Documents', and 'Summary'. The 'Posting Details' tab is highlighted with a blue check circle.
- Posting Details:**
  - Check spelling:** A green checkmark icon and a dropdown menu.
  - Required Information:**
    - Classification Information:**
      - Position/Classification Title: Post Doc Research Associate
      - Job Code: 81069
      - Classification Type: Post Doctoral
      - Minimum Experience/Education: (Empty text area)
- Save and Next buttons:** Points to the 'Save' and 'Next >>' buttons in the top right corner.
- Blue Check Circle:** Points to the blue check circle next to the 'Posting Details' tab in the tab list.

## Create New Post Doctoral Posting from a Position Description – Posting Details Tab

Since you are creating a new **Post doctoral Posting** from an approved position description, many of the fields will already be filled in with information copied from the position description. Follow the instructions at the top of the page to complete any remaining required fields, then click **Next >>** button to save changes and navigate to the next tab:

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

**Posting Details**

[Check spelling](#)

To create a Posting, first complete the information on this screen, then click the **Next** button or select the page in the left hand navigation menu. Proceed through all sections completing all necessary information. To submit the Posting to Human Resources, you must go to the **Posting Summary Page** by clicking on the **Next** button until you reach the Posting Summary Page or select Posting Summary Page from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options.

**\* Required Information**

**Classification Information**

HELP TEXT: If the details below are incorrect, please make the appropriate Classification selection using the "Classification" Tab on the left side menu while modifying the Position.

Position/Classification Title	Post Doc Research Associate
Job Code	81069
Classification Type	Post Doctoral
Minimum Experience/Education	

**Save and Next buttons.**

**Fields from the approved position description will be copied in to your new posting.**

**Position Overview**

Primary Purpose of Position	Test
Primary Function of Organizational Unit	Test

**Position Information**

* Position Title	Post Doctoral Research Associate (TLB40)
* Working Title	<input type="text"/> This field is required.
Position Number	999999
* JCAT	12345
Approved Salary	\$40,000
* Salary Range	<input type="text"/> This field is required. <small>Enter salary to be advertised amount or a description such as "commensurate with education and experience"</small>
* FLSA	Exempt
* Appointment Type	Time Limited - Full-time
* If Time Limited, Appointment Length	<input type="text"/> 08/08/2014 <small>Please indicate budget end date. If funded from more than one fund indicate earliest end date. This field cannot be left blank.</small>

FTE

**Position Overview and Position Information: Continue to enter posting information into any empty fields as needed.**

**Required fields will be highlighted in RED.**

You can indicate other users you would like to have **Supervisor** and / or **Applicant Reviewer** access to the posting by searching for their name in the Supervisor and Applicant Reviewer fields. Indicate the proposed **Open Date** and **Date Desired for Closing or Initial Review (minimum 30 days)**, which will define the number of days applicants can view and apply for the posting. The minimum allowable posting period for



Post Doctoral positions is thirty (30) calendar days, however, a Post Doctoral posting can be posted as open until filled. Select the appropriate **Fast Find** category for the posting to ensure it is included in the correct pre-defined search when an applicant clicks on the corresponding Fast Find button through the applicant portal. Choices are Administrators and Research, Faculty, Post Doctoral, Temporary Staff, and Staff:

**Posting Detail Information**

\* **Supervisor**  This field is required. **Supervisor and / or Applicant Reviewer access to the posting.**

\* **Applicant Reviewer**  This field is required.

**Posting Number**

\* **Open Date**  This field is required. **Minimum allowable posting period is thirty (30) calendar days. Posting can also be open until filled.**

**Date desired for closing or initial review ( minimum 30 days).**

**Close Date**

**Open Until Filled** No

\* **Special Instructions to Applicant**

\* **Fast Find Information**  This field is required. **Select the most appropriate Fast Find category for the posting.**

Include details regarding any special advertising requests, such as posting the position on additional job posting websites or in specific print media outlets, in the **Advertising Summary** field. A link to the job posting on the North Carolina A&T State University applicant portal will be included in any special advertising. The **Pass Message** and **Fail Message** fields contain template notifications that will be sent to applicants who are screened out of the posting through **Supplemental Questions**. Once all fields on the Posting Details Tab are complete, click the **Next >>** button to save your changes and move to the next tab. You can also click the “Save” button if you wish to save your changes and keep working on the current tab:

**Advertising Summary**  **Include any special advertising request information.**

*Please list additional external advertising sources if different than standard advertising sources.*

*Standard sources include: NC Employment Security Commission & UNC General Administration*

\* **Pass Message**  **Template applicant e-mail notifications.**

\* **Fail Message**  **Template applicant e-mail notifications.**

**Save and Next buttons.**

## Create New Post Doctoral Posting from a Position Description – Position Funding Information Tab

Funding Source information from the approved position description will copy over into the fields in the Funding Source Details section of this tab, and you can make edits as necessary. **PLEASE NOTE:** The annual amount budgeted must support the hiring range indicated on the Posting Details Tab.

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.

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. **PLEASE NOTE:** Each time you add an additional entry, you will need to **scroll down below the last saved entry** to enter a new funding source. Once all funding sources have been added, click **Next >>** to move to the next tab:

Funding Source Details

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.

State Appropriated Funding / Non-State Appropriated Funding

State Appropriated Funding

If non-state, select source of funding

Please select

If other, designate source

Budget Code

16070 (State)

Fund

111111

Format: 6 digit number #####

Org

11111

Format: 5 digit number #####

Account

11111

Format: 5 digit number #####

Program

111

Format: 3 digit number ###

Date Funds End

Annual Amount

\$45,000

Percentage of FTE

1.0

☐ Remove Entry?

Add Funding Source Details Entry

Funding information will be copied in from the approved position description, which you can edit as necessary.

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.

IMPORTANT NOTE: Remember to click "Save" after each funding source is entered.

Save << Prev Next >>

## Create New EHRA Posting from a Position Description – Supplemental Questions Tab

In the **Supplemental Questions** tab, you can identify screening questions related to an applicant's education and experience that must be answered as part of the application process. To add supplemental questions to your posting, click on the button labeled **"Add a Question"**. A pop up section will appear where you can add an existing question or submit a new one. Once done, click on the **Next >>** button to save changes and proceed to the next tab:

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Postings / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Edit: Supplemental Questions

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions**
- Applicant Documents
- References
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

### Supplemental Questions

Adding New Posting 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 Posting 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.

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.

**Included Supplemental Questions**

Position	Required	Category	Question	Status

Save << Prev Next >>

Click to add supplemental questions.

Add a question

**Adding Existing Posting Questions:** There are two ways to search for approved posting questions to add to the job being posted: by key word search or by question category. To add an existing question, click the check box next to the question you wish to add.

**Submitting New Posting Questions:** To submit a new question for review and approval, click on the button labeled "Add a Question". When the **Available Supplemental Questions** box opens, click on the "Add a New One" link in the bottom right hand corner.

Add a Question

### Available Supplemental Questions

Category: Any Keyword:

Add	Category	Question
<input type="checkbox"/>	Uncategorized	How did you hear about this employment opportunity?
<input type="checkbox"/>	Experience	Do you have at least one year of responsible payroll or financial and statistical record keeping experience?
<input type="checkbox"/>	Education	Do you have a high school diploma or equivalent?
<input type="checkbox"/>	Experience	Do you have HR experience?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Education	Do you have a Master's Degree?
<input type="checkbox"/>	Experience	How many years of Accounting experience do you have in a higher education setting?
<input type="checkbox"/>	Education	Do you have a High School diploma?
<input type="checkbox"/>	Experience	Do you have at least 4 years of experience?

Displaying all 10

Can't find the one you want? [Add a new one](#)

Submit Cancel

Filter supplemental questions by keyword or category.

Click to submit a custom supplemental question for review and approval.

Click check box to add an existing supplemental question.

Click Submit when finished.

**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.

The screenshot shows the 'Included Supplemental Questions' interface. It features a table with columns: Position, Required, Category, Question, and Status. There are four rows of questions. Annotations include:

- A red arrow pointing to the 'Position' column with the text 'Reorder questions.'
- A red arrow pointing to the 'Required' column with the text 'Click to make questions required.'
- A red arrow pointing to the 'Question' column with the text 'Assign points to answers.'
- A red arrow pointing to the 'Points' and 'Disqualifying' columns with the text 'Click to assign disqualifying answers.'

Below the table, there is a section for 'Possible Answers: Predefined Options' with a table of answers and checkboxes for points and disqualifying responses.

Answer	Points	Disqualifying
1. 0 years	<input type="checkbox"/>	<input type="checkbox"/>
2. 1-3 years	<input type="checkbox"/>	<input type="checkbox"/>
3. 4-5 years	<input type="checkbox"/>	<input type="checkbox"/>
4. 5+ years	<input type="checkbox"/>	<input type="checkbox"/>

## Create New Post Doctoral Posting from a Position Description – Applicant Documents Tab

In the **Applicant Documents** tab, Applicant documents can be included in the application process by selecting **Included** to make the documents optional and **Required and Included** to make the document(s) mandatory to complete the application process. Documents attached by the applicant during the application process will be accessible for viewing during applicant review. Once done, click on the **Next >>** button to save changes and proceed to the next tab:

The screenshot shows the 'Applicant Documents' tab in the 'Editing Posting' interface. It features a table with columns: Order, Name, Included?, and Required?. There are seven rows of documents. Annotations include:

- A red arrow pointing to the 'Included?' column with the text 'Click Included to make uploading a document optional.'
- A red arrow pointing to the 'Required?' column with the text 'Click **both** Included **and** Required to make uploading a document required.'

Order	Name	Included?	Required?
1	Resume	<input type="checkbox"/>	<input type="checkbox"/>
2	Cover Letter	<input type="checkbox"/>	<input type="checkbox"/>
3	Curriculum Vitae	<input type="checkbox"/>	<input type="checkbox"/>
4	Teaching Philosophy	<input type="checkbox"/>	<input type="checkbox"/>
5	Letter Of Reference 1	<input type="checkbox"/>	<input type="checkbox"/>
6	Letter Of Reference 2	<input type="checkbox"/>	<input type="checkbox"/>
7	Letter Of Reference 3	<input type="checkbox"/>	<input type="checkbox"/>

## Create New Post Doctoral Posting from a Position Description – References / Letters of Recommendation Tab

In the **References / Letters of Recommendation** tab, you can indicate whether or not you wish to require applicants to submit references with their application. You can also indicate the minimum and maximum number of references you would like applicants to submit, and the cutoff date by which reference information must be submitted:

Postings / Post Doctoral / Post Doctoral Research Associate (TLB40) (Draft) / Edit: References

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References**
- Search Committee
- Ranking Criteria
- Posting Documents
- Summary

### References

Save << Prev Next >>

Check spelling

**Accept References:** Please indicate whether or not you wish to require applicants to submit references with their application.

**Minimum Requests:** Please indicate the minimum number of references you would like applicants to submit.

**Maximum Requests:** Please indicate the maximum number of references you would like applicants to submit.

**Cutoff Date:** Please indicate the date by which reference information must be submitted.

\* Required Information

References

\* Accept References  **Indicate Yes or No.**

Minimum Requests

Maximum Requests  **Recommended range is 3 to 5.**

Cutoff Date

Save << Prev Next >>

**Reference information may not be submitted after this date.**

## Create New Post Doctoral Posting from a Position Description – Search Committee Tab

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

In the **Search Committee** tab, you can assign search committee members who will have access to review application information for a specific posting. Search committee members can view applications, applicant documents, and evaluate / rank applicants based upon ranking criteria you establish as part of the posting. Requests to add search committee members will be reviewed and approved by the Division of human Resources (DHR) once the posting request is routed to DHR for approval. Upon DHR approving a search committee member's access, the search committee member will receive an e-mail notification with instructions on how to access the online posting and related application information:

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References/Letters of ...
- Search Committee**
- Ranking Criteria
- Posting Documents
- Summary

### Search Committee

Save << Prev Next >>

Search Committees are advisory in nature and serve the purpose of recruiting a qualified applicant pool, reviewing their credentials, and recommending acceptable candidates to the hiring manager. Search Committees can consist of University employees both internal and external to the hiring unit, as well as individuals external to the University who represent key stakeholders.

**Search Committee Members**

No Search Committee Members have been assigned to this Posting yet.

**Search**

Find a User to assign as a Search Committee Member.

First Name

Last Name

Email Address

**To search for a pre-approved search committee member, enter the name and click the Search button.**

After searching for a pre-approved search committee member, click on the **Add Member** button to add them to your search committee. You can also make a search committee member the chair of the search committee by clicking on the check box next to **"Make Member the Committee Chair"**:

**Search Committee Members**

No Search Committee Members have been assigned to this committee.

---

**Search**

Find a User to assign as a Search Committee Member.

Name	Email Address	Add Member
Lonnie Crofts	emailaddress@zed.zed	<input type="button" value="Add Member"/> <input type="checkbox"/> Make Member The Committee Chair

First Name   
 Last Name   
 Email Address

Click the check box to assign the search committee member as the committee chair.  
 Click the Add Member button to add the search committee member you searched for.

To create an account for a new search committee member, enter in the committee member's name, current e-mail address, and desired username, then click on the **Submit** button:

**New Search Committee Member**

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (\*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

\* **First Name**   
 \* **Last Name**   
 \* **Email**   
 \* **Username**

To create an account for a new search committee member, complete the fields and click submit.

If the requested search committee member is already an assigned user of the PeopleAdmin system, their user account information will be displayed, and you can add them to your search committee by clicking on the **Add User** button:

**Matching User**  
**Username** ambraun  
**First Name** Amy  
**Last Name** Braun  
**Email** emailaddress@zed.zed  
**Preferred Group** Employee

Click the Add User button to add the new search committee member in a pending status. Access will be reviewed and approved by DHR.

[Clear Matching Users](#)

### New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (\*).

**Account Information**  
Please enter the following information to create an account for a new Search Committee Member.

\* **First Name**   
\* **Last Name**   
\* **Email**   
\* **Username**

## Create New Post Doctoral Posting from a Position Description – Ranking Criteria Tab

**Ranking Criteria** can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant:

**Editing Posting**  
☒ Posting Details  
☒ Position Funding Infor...  
☒ Supplemental Questions  
☒ Applicant Documents  
☒ References/Letters of ...  
☒ Search Committee  
☒ **Ranking Criteria**  
☒ Posting Documents  
☐ Summary

### Ranking Criteria

Ranking Criteria can be used by search committees during the applicant review process to rank applicants based upon job-related experience and education factors. This optional tool can be helpful in identifying the most qualified candidates in an applicant pool. Ranking criteria are not presented to the applicant.

Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval.

Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled "Add a Criterion". When the Available Evaluative Criteria box opens, click on the "Add a new one" link in the bottom right hand corner.

Included Evaluative Criteria		
Category	Description	Status
		<div> <div>Click to add ranking criteria.</div> <input type="button" value="Add a Criterion"/> </div>



To add ranking criteria, click on the button labeled **"Add a Criterion"**. A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval. To submit a new ranking criterion for review and approval, click on the button labeled **"Add a Criterion,"** then click on the **"Add a new one"** link in the bottom right hand corner of the dialog box that opens:

**Add a Ranking Criterion**

Available Evaluative Criteria

Category: Any Keyword:

**Search for ranking criteria by keyword or category.**

Add	Category	Description
<input type="checkbox"/>	Uncategorized	Rank Experience - 5 is the highest
Possible Answers: 1. 1 2. 2 3. 3 4. 4 5. 5		
Applicant workflow state: <span>Under Review by HR</span>		
<input type="checkbox"/>	Uncategorized	Please rate the candidates experience related to the
<input type="checkbox"/>	Uncategorized	Teaching experience in a university

**Indicate the applicant workflow state that allows an applicant to be ranked.**

**Click to submit a custom ranking criterion for review and approval.**

Can't find the one you want? [Add a new one](#)

**Click check box to add an existing ranking criterion.**

**Click Submit when finished.**

**Editing Posting**

- Posting Details
- Position Funding Infor...
- Supplemental Questions
- Applicant Documents
- References/Letters of ...
- Search Committee
- Ranking Criteria**
- Posting Documents
- Summary

**Ranking Criteria**

Ranking Criteria can be used by search c... experience and education factors. This optiona... criteria are not presented to the applicant.

Adding New Ranking Criteria: Click on the button labeled "Add a Criterion". A dialog box will appear where you can add an existing criterion by checking the box in the "Add" column or submit a new one for approval.

Submitting New Ranking Criteria: To submit a new ranking criterion for review and approval, click on the button labeled "Add a Criterion". When the Available Evaluative Criteria box opens, click on the "Add a new one" link in the bottom right hand corner.

**Included Evaluative Criteria**

Category	Description	Weight	Workflow State	Status
Uncategorized	Teaching experience in a university		Under Review by HR	active
Uncategorized	Please rate the candidates experience related to the job:		Under Review by HR	active
Uncategorized	Rank Experience - 5 is the highest		Under Review by HR	active

**Click Save or Next to move to the next tab.**

## Create New Post Doctoral Posting from a Position Description – Posting Documents Tab

The **Posting Documents Tab** allows you to upload documents as attachments that will route with the posting 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.

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

**Click “Actions”, then select Upload New, Create New, or Choose Existing in order to upload an attachment.**

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

## Create New Post Doctoral Posting from a Position Description – Summary Tab

The **Summary Tab** allows you to perform a final review all of the posting 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 posting summary carefully before continuing.

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

**Click “Edit” to make edits to a tab.**

**Blue Circle Check**

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 **Summary Tab** by clicking on the link in the left column:

**Click “Edit” to make edits to a tab.**

**Orange Circle Exclamation Point**

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)”**:

**Click on “Take Action On Pending Request”, then select approver to move the request to the next step in the approval workflow.**

Take Action On Posting

WORKFLOW ACTIONS

- Keep working on this Posting
- Canceled (move to Canceled)
- Send to Department Head (move to Department Head)

Posting: Post Doctoral Research Associate (Post Doctoral) [Edit](#)

Current Status: Draft

Position Type: Post Doctoral  
Section/Unit: VC for Human Resources

Created by: [Name]  
Owner: [Name]

Summary | History | Settings | Hiring Page

Please review the details of the posting carefully before continuing.

To take the action, select the appropriate **Workflow Action** by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your **Watch List** in the popup box that appears. When you are ready to submit your posting, click on the **Submit** button on the popup box.

To edit the posting, click on the **Edit** link next to the **Section Name** in the **Summary** Section. This will take you directly to the **Posting Page** to **Edit**. If a section has an orange icon with an exclamation point, you will need to review this section and make necessary corrections before moving to the next step in the workflow.

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:

**Take Action**

**Send to Department Head (move to Department Head)**

Comments (optional)

☒ Add this pending request to your watch list?

Submit Cancel

**Comments are optional and can be viewed by the next level approver in the History tab.**

**Adding the action to your Watch List allows you to easily track and monitor the action’s progress.**

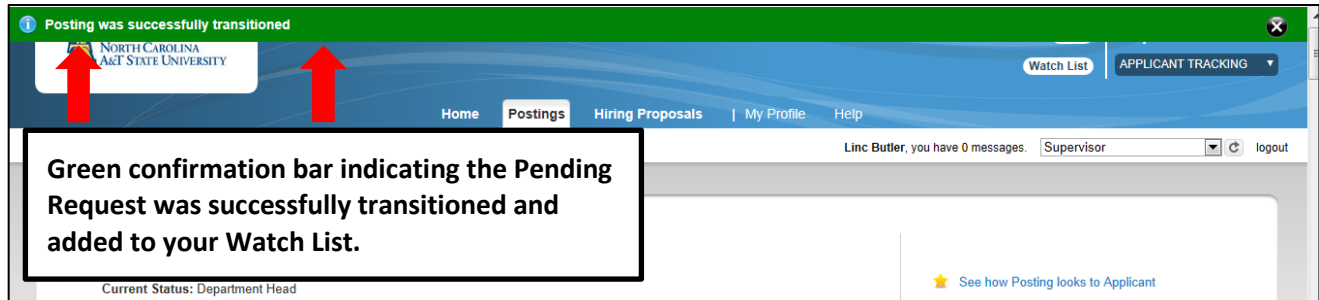
If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

**Red bar indicating the required fields that need to be completed before submitting the request to the next step in the workflow.**

! "Fund" is required and All required fields must be set before transitioning.

Take Action On Posting

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

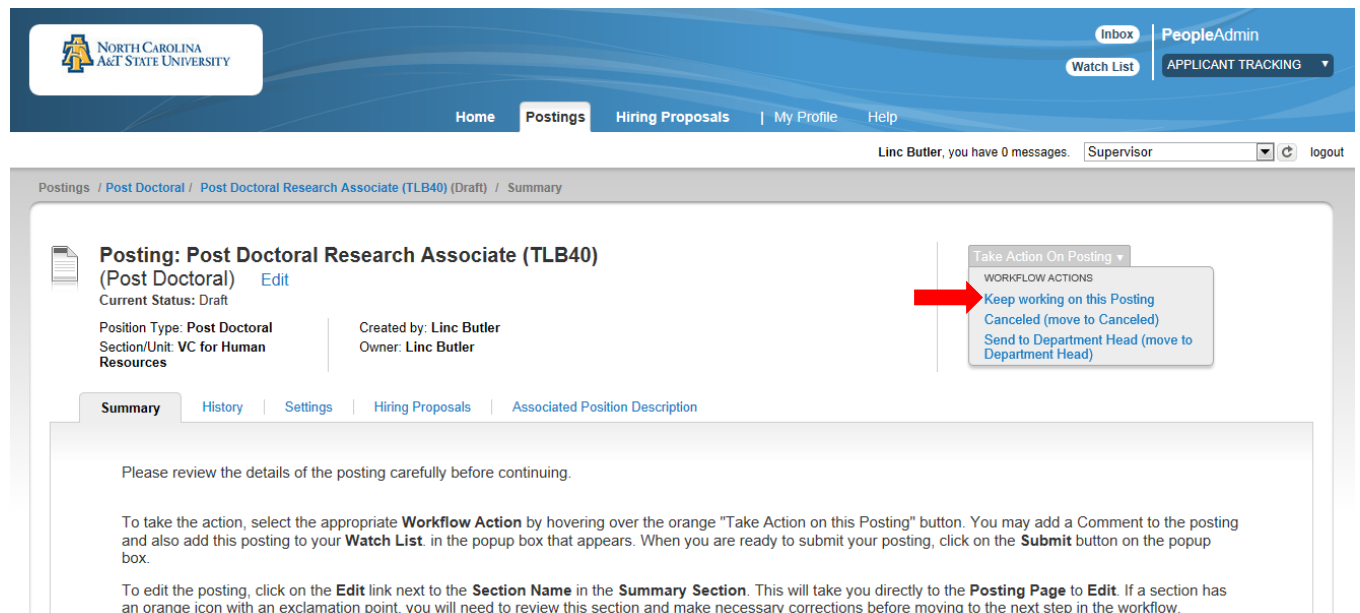


The next level approver (the Department Head in this example) will receive the pending request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## Create New Post Doctoral Posting from a Position Description - Saving to Return to a Pending Request Later

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the "Save" button located in either the top or bottom right corner
- 2) Select "Summary" from the Tab List (illustrated above)
- 3) Select "Keep Working on this Posting"



- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click "Submit"

The **Posting** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action. Hover your cursor over the **Postings tab** and click on “EHRA” You will then return to the **EHRA Postings view**, which provides a list of all postings based on your active user type, from which you can search for and select this posting and continue.

## Applicant Review

**IMPORTANT NOTE:** Prior to beginning applicant review, you must switch your user type to **Applicant Reviewer**. If you do not have the Applicant Reviewer user type in your drop down menu, contact a [Recruitment Coordinator](#). To view applicants who have applied to a posting, go to the **Postings tab** and click on the position type in the drop down list that matches the posting you wish to view: **SHRA, EHRA, or Post Doctoral**. Since the **Applicant Review** process is identical regardless of position type, we will be using an **SHRA** posting for the purpose of this User Guide. The only notable difference in how applications are routed is:

- Applications for SHRA postings route to DHR first for initial screening to ensure State minimum education and experience requirements are met prior to being routed to the hiring manager.
- Applications for EHRA and Post Doctoral postings route directly to the hiring manager and are not pre-screened by DHR.

You will then be taken to the **SHRA Postings** view, which provides a list of all current/pending SHRA postings initiated based on your active user type as follows:

Active User Type	Positions in Position Descriptions List
Supervisor	Current / pending postings for positions that are direct reports to the Supervisor only.
Department Head	Current / pending postings for all positions that report to the department the Department Head is assigned to.
Dean / Vice Chancellor	Current / pending postings for all positions within the School, College, or Division the Dean / Vice Chancellor is assigned to.

## Applicant Review – Postings View

In the **SHRA Postings** view, you can search postings by any number of criteria, including but not limited to position title, posting number, position number, department name, supervisor name, or workflow state. Searches are fully customizable by position and posting attributes, and you can save custom searches for use again later:

**Active user type is Applicant Reviewer.**

**List of current / pending SHRA postings by active user type.**

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

Working Title	Posting Number	Position Number	Department	Active Applications	Workflow State	Last Updated	(Actions)
Employee Relations Counselor (TLB11)	SPA043	TLB11	Employee Relations	10	Closed	August 08, 2013 at 01:37 pm	Actions
Employee Relations Counselor (TLB13)	SPA045	TLB13	Employee Relations	1	Closed	August 08, 2013 at 10:30 am	Actions
Human Resources Specialist	SPA012	000066	Student & Foreign National Employment	0	Closed	August 08, 2013 at 09:52 am	Actions
Administrative Support Assoc.	SPA027	000051	Classification & Compensation	1	Closed	August 08, 2013 at 09:10 am	Actions
Recruitment Assistant - 1	SPA044	008	Recruitment and Retention	1	Closed	August 07, 2013 at 05:06 pm	Actions
Human Resources Specialist	SPA041	LC0040	Recruitment and Retention	3	Closed	August 06, 2013 at 01:45 pm	Actions
Employee Relations Counselor (TLB11)	SPA039	TLB11	Employee Relations	1	Closed	August 06, 2013 at 10:42 am	Actions
Employee Relations Counselor (TLB10)	SPA037	TLB10	Employee Relations	10	Closed	August 05, 2013 at 02:58 pm	Actions
Employee Relations Counselor (TLB9)	SPA036	TLB9	Employee Relations	1	Closed	August 02, 2013 at 03:12 pm	Actions
Employee Relations Counselor (TLB8)	SPA035	TLB8	Employee Relations	1	Closed	August 01, 2013 at 03:03 pm	Actions
Employee Relations Counselor (TLB7)	SPA034	TLB7	Employee Relations	1	Closed	August 01, 2013 at 10:21 am	Actions

You can also view the workflow state of current / pending postings and see how many active applicants have applied to each posting:

**Number of active applicants that have applied to each posting.**

**Current workflow state of each posting.**

Working Title	Posting Number	Position Number	Department	Active Applications	Workflow State	Last Updated	(Actions)
Employee Relations Counselor (TLB11)	SPA043	TLB11	Employee Relations	10	Closed	August 08, 2013 at 01:37 pm	Actions
Employee Relations Counselor (TLB13)	SPA045	TLB13	Employee Relations	1	Closed	August 08, 2013 at 10:30 am	Actions
Human Resources Specialist	SPA012	000066	Student & Foreign National Employment	0	Closed	August 08, 2013 at 09:52 am	Actions
Administrative Support Assoc.	SPA027	000051	Classification & Compensation	1	Closed	August 08, 2013 at 09:10 am	Actions
Recruitment Assistant - 1	SPA044	008	Recruitment and Retention	1	Closed	August 07, 2013 at 05:06 pm	Actions
Human Resources Specialist	SPA041	LC0040	Recruitment and Retention	3	Closed	August 06, 2013 at 01:45 pm	Actions

Once you identify the posting you would like to begin reviewing applicants for, go to the **Actions** button in the far right-hand column and select **“View Applicants”**:

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

Working Title	Posting Number	Position Number	Department	Active Applications	Workflow State	Last Updated	(Actions)
Employee Relations Counselor (TLB11)	SPA039	TLB11	Employee Relations	1	Closed	August 06, 2013 at 10:42 am	Actions ▼
Employee Relations Counselor (TLB11)	SPA048	TLB11	Employee Relations	10	Closed	August 08, 2013 at 01:37 pm	Actions ▼

GENERAL  
View Posting  
View Applicants  
TRACKING  
Stop Watching

## Applicant Review – Applicants Tab

You will then be taken to the **Applicants** tab of the posting where you will see a list of all the applicants who have applied to the posting. In this view, you can search for applicants by keyword, and searches can be customized and saved for later use. You can also access any attached applicant documents by clicking on the document you wish to view in the **Documents** column. To view an applicant’s application information, click on the name of an applicant.

Postings / SPA / Employee Relations Counselor (TLB11) (Closed) / Applicant Review

Posting: Employee Relations Counselor (TLB11) (SPA)  
Current Status: Closed  
Position Type: SPA  
Section/Unit: Employee Relations  
Created by: Linc Butler  
Owner: Recruitment

Summary | History | **Applicants** | Reports | Hiring Proposals | Associated Position Description

Search More search options

View attached applicant documents.

Active Applicants (10 Items Found)

First Name	Last Name	Workflow State (Internal)	Last Updated	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 126?	Are you currently employed by the state of North Carolina?	Do you wish to claim veteran's preference?	Are you a veteran or spouse of a disabled veteran?	Documents	(Actions)
Lickety	Spitt	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No			Resume	Actions ▼
John	Smith	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No				Actions ▼
Gabbie	Union	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No				Actions ▼
Lola	Fairweather	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No				Actions ▼
Bruce	Campbell	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm		No	No	No	Resume	Actions ▼

When you click on the name of an applicant, you will be taken to the **Job Application** view, where you can view all submitted information the applicant has provided, including personal information, educational history, employment history, reference information, answers to supplemental questions, and attached applicant documents. You can also view the posting the applicant applied to, preview the application, and evaluate the applicant by clicking on the links located in the top right-hand corner just below the orange **Take Action On Job Application** button. :



Postings / ... / Employee Relations Counselor (TLB11) (Closed) / Applicant Review / Bruce Campbell Under Review by Dept/Committee

Search Results: [Previous](#) | [Next](#)

**Job application: Bruce Campbell (SPA)**  
 Current Status: Under Review by Dept/Committee  
 Application form: Application

Full name: Bruce Campbell  
 Address: 107 Elm St.  
 Greensboro, NC  
 United States of America  
 Username: bcampbell  
 Email: tlbutler@zed.zed  
 Phone (Primary): 336-336-3336  
 Phone (Secondary): 336-285-2222  
 Position Type: SPA  
 Section/Unit: Employee Relations

Created by: Bruce Campbell  
 Owner: Applicant Reviewer

**Annotations:**

- Applicant name and workflow status.** (Points to the job application header)
- Take Action on Job Application button.** (Points to the 'Take Action On Job Application' button)
- Click to View Posting Applied To, Preview Application, or Evaluate Applicant.** (Points to the 'View Posting Applied To', 'Preview Application', and 'Evaluate Applicant' links)
- Scroll to view all application information.** (Points to the 'Personal Information' section)

**Personal Information**

Contact Information

First Name	Bruce
Middle Name (enter NMN if no middle name)	Ashley
Last Name	Campbell
Suffix	
Last 4 Digits of Social Security Number	5555
Address1	107 Elm St.
Address2	

At the bottom of the **Job Application** view, you can view attached applicant documents. You can also view the application as a pdf, or view the application and all attached applicant documents as one pdf:

**Required Documents**

No required documents added.

**Optional Documents**

**Annotations:**

- Any required applicant documents can be accessed here.** (Points to the 'Required Documents' section)
- Any optional applicant documents can be accessed here.** (Points to the 'Optional Documents' section)

Document Type	Name	Size	Status
Resume	Resume 07-23-13 12:38:42	(21.7 KB)	PDF complete
Cover Letter	-	-	-
Curriculum Vitae	-	-	-

**Recommendation Documents**

No recommendations submitted.

**PDF Documents**

Document Type	Actions
Application	<a href="#">Recreate PDF</a>
Application and attached documents	<a href="#">Recreate PDF</a>

**Annotations:**

- Click to view as a pdf.** (Points to the 'Application' document type)

## Applicant Review – Changing the Workflow State for an Applicant

To change the workflow state of an applicant, click on the orange **Take Action On Job Application** button and select the most appropriate action. Changing an applicant's workflow state to **"Interview (move to Interview)"** will also update their status in the list of applicants on the **Applicants** tab:

Linc Butler, you have 0 messages. Applicant Reviewer | [logout](#)

Postings / ... / Employee Relations Counselor (TLB11) (Closed) / Applicant Review / Bruce Campbell Under Review by Dept/Committee

Search Results: [Previous](#) | [Next](#)

**Job application: Bruce Campbell (SPA)**  
 Current Status: Under Review by Dept/Committee  
 Application form: Application

Full name: Bruce Campbell  
 Address: 107 Elm St.  
 Greensboro, NC  
 United States of America  
 Username: bcampbell  
 Email: tlbutler@zed.zed  
 Phone (Primary): 336-336-3336  
 Phone (Secondary): 336-285-2222  
 Position Type: SPA  
 Section/Unit: Employee Relations

Created by: Bruce Campbell  
 Owner: Applicant Reviewer

**Annotations:**

- Change the workflow state of an applicant by selecting the most appropriate action in this list.** (Points to the 'Take Action On Job Application' button and the dropdown menu)

**Take Action On Job Application**

WORKFLOW ACTIONS

- Keep working on this Job application
- Not Selected for Interview (move to Not Selected for Interview)
- Select to Interview (move to Interview)

If you change an applicant's workflow state to **"Not Selected for Interview (move to Not Selected for Interview)"**, you will be **required** to select the most appropriate non-selection reason for that applicant. Once an applicant's workflow status is changed to **"Not Selected for Interview (move to Not Selected for Interview)"**, the applicant is moved to an inactive status and their name will be removed from the applicant list on the **Applicants** tab:

**Take Action**

Not Selected for Interview (move to Not Selected for Interview)

Reason (required)

Please select

- Availability - Unable to contact.
- Availability - Withdrawn from consideration.
- Availability - Accepted other employment.
- Background Check - Candidate did not pass criminal background check process.
- Experience - Application shows unacceptable work history.
- Experience - Does not meet experience and/or competency requirements of the position.
- Experience - Sufficient Experience but less than selected candidate.
- Education - Does not meet educational requirements of the position.
- Education - Could perform duties only with extensive training and orientation period.
- References - Reference information indicates insufficient education and/or work experience.
- References - Reference information indicates unacceptable work history.
- References - Unable to contact.
- References - References not compatible with job duties
- Priority Selection - Selected candidate with layoff priority.

Submit Cancel

## Applicant Review – Changing the Workflow States for a Group of Applicants

To change the workflow state for a group of applicants at the same time, go to the **Applicants** tab of the posting and click the **Select All** check box to select all applicants in the applicant list. Then hover your cursor over the **Actions** button and select **"Move in Workflow"**.

**Select All check box.**


**Actions drop down menu.**

**Click Move in Workflow.**

First Name	Last Name	Workflow State (Internal)	Last Updated	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 126?	Are you currently employed by the state of North Carolina?	wish to claim veteran's preference?	a veteran or of a disabled veteran?	Actions
<input checked="" type="checkbox"/>	Lickety	Split	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm	No			Resume Actions
<input checked="" type="checkbox"/>	John	Smith	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm	No			
<input checked="" type="checkbox"/>	Gabbie	Union	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm	No			
<input checked="" type="checkbox"/>	Lola	Fairweather	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm	No			
<input checked="" type="checkbox"/>	Bruce	Campbell	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm	No	No	No	Resume Actions
<input checked="" type="checkbox"/>	Beyonce Knowles	Knowles	Under Review by Dept/Committee	August 08, 2013 at 01:32 pm	Yes			Actions

First select the appropriate workflow state for the group of applicants in the **"Change for all Applicants"** drop down menu. Changing an applicant's workflow state to **"Interview (move to Interview)"** will also update their status in the list of applicants on the **Applicants** tab:

Postings / ... / [Employee Relations Counselor \(TLB11\)](#) / [Applicant Review](#) / Bulk Workflow Status Change

 Editing: Workflow States for 8 Applicants


Change for all applicants Select a workflow state...  
Select a workflow state...  
Not Selected for Interview  
Interview **Select appropriate workflow state.**

Applicant	Current State	New State	Reason
Lickety Split	Under Review by Dept/Committee	Select a workflow state...	
John Smith	Under Review by Dept/Committee	Select a workflow state...	
Gabbie Union	Under Review by Dept/Committee	Select a workflow state...	
Lola Fairweather	Under Review by Dept/Committee	Select a workflow state...	
Bruce Campbell	Under Review by Dept/Committee	Select a workflow state...	
Beyonce Knowles Knowles	Under Review by Dept/Committee	Select a workflow state...	
Katherine Jackson	Under Review by Dept/Committee	Select a workflow state...	
Diana Ross	Under Review by Dept/Committee	Select a workflow state...	

[Save changes](#) or [Cancel](#)

If you change the applicant group's workflow state to **"Not Selected for Interview (move to Not Selected for Interview)"**, you will then be **required** to select the most appropriate non-selection reason for the applicant group. Once an applicant's workflow status is changed to **"Not Selected for Interview (move to Not Selected for Interview)"**, the applicant is moved to an inactive status and their name will be removed from the applicant list on the **Applicants** tab:

Postings / ... / [Employee Relations Counselor \(TLB11\)](#) / [Applicant Review](#) / Bulk Workflow Status Change

 Editing: Workflow States for 8 Applicants

Change for all applicants Not Selected for Interview **Select the appropriate non-selection reason for the applicant group.**

Applicant	Current State	New State	Reason
Lickety Split	Under Review by Dept/Committee	Not Selected for Interview	Please select... Please select... Availability - Unable to contact. Availability - Withdrew from consideration. Availability - Accepted other employment. Background Check - Candidate did not pass criminal background check process. Experience - Application shows unacceptable work history. Experience - Does not meet experience and/or competency requirements of the position. Experience - Sufficient Experience but less than selected candidate. Education - Does not meet educational requirements of the position. Education - Could perform duties only with extensive training and orientation period. References - Reference information indicates insufficient education and/or work experience. References - Reference information indicates unacceptable work history. References - Unable to contact. References - References not compatible with job duties Priority Selection - Selected candidate with layoff priority.
John Smith	Under Review by Dept/Committee	Not Selected for Interview	
Gabbie Union	Under Review by Dept/Committee	Not Selected for Interview	
Lola Fairweather	Under Review by Dept/Committee	Not Selected for Interview	
Bruce Campbell	Under Review by Dept/Committee	Not Selected for Interview	Please select...
Beyonce Knowles Knowles	Under Review by Dept/Committee	Not Selected for Interview	Please select...

Editing: Workflow States for 8 Applicants

**Workflow state and non-selection reason is updated for all applicants in the group.**

Change for all applicants Not Selected for Interview Experience - Sufficient Experience but less than selected candidate.

Applicant	Current State	New State	Reason
Lickety Split	Under Review by Dept/Committee	<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
John Smith	Under Review by Dept/Committee	<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
Gabbie Union	Under Review by Dept/Committee	<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
Lola Fairweather	Under Review by Dept/Committee	<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
Bruce Campbell	Under Review by Dept/Committee	<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
Beyonce Knowles	Under Review by Dept/Committee	<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
Katherine Jackson	Under Review by Dept/Committee	<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
Diana Ross	Under Review by Dept/Committee	<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>

Save changes or Cancel

You can also make changes to individual applicants in the list by clicking on the drop down list in the **New State** column and selecting the appropriate workflow state. When finished making updates, click the **Save Changes** button located on the bottom left-hand corner of the page:

Editing: Workflow States for 8 Applicants

Change for all applicants Not Selected for Interview Experience - Sufficient Experience but less than selected candidate.

Applicant	Current State	New State	Reason
Lickety Split	Under Review by Dept/Committee	<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
		<span>Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
		<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
		<span>Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
		<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
		<span>Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>
Diana Ross	Under Review by Dept/Committee	<span>Not Selected for Interview</span>	<span>Experience - Sufficient Experience but less than selected candidate.</span>

Save changes

**Click to change individual workflow states.**

**Click to Save Changes.**

## [Applicant Review – Routing your Selected Candidate for Approval](#)

Once you have completed interviews, checked references, and identified a selected candidate, you can then route your selected candidate through the candidate approval workflow within your School, College, or Division to the EEO Approval workflow state. You must first change the workflow state of all non-selected applicants from the workflow state of **“Interview”** to the workflow state of **“Interviewed, Not Hired (move to Interviewed, Not Hired)”**. To do this, hover your cursor over the **Take Action On Job Application** button located in the top right-hand corner of the non-selected applicant’s Job Application view and select **“Interviewed, Not Hired (move to Interviewed, Not Hired)”**. You will then be **required** to select the most appropriate non-selection reason for that applicant. Once an applicant’s workflow status is changed to **“Not Selected for Interview (move to Not Selected for Interview)”**, the applicant is moved to an inactive status and their name will be removed from the applicant list on the **Applicants** tab:

Click name to view application.

<input type="checkbox"/>	First Name	Last Name	Workflow State (Internal)	Last Updated	Are you a layoff candidate with the State of N.C. eligible for RIF priority reemployment consideration as described by GS 126?	Are you currently employed by the state of North Carolina?	Do you wish to claim veteran's preference?	Are you a veteran or spouse of a disabled veteran?	Documents	(Actions)
<input type="checkbox"/>	John	Smith	Interview	August 14, 2015 1:00 pm		No				Actions
<input type="checkbox"/>	Bruce	Campbell	Interview	August 14, 2015 1:00 pm		No	No	No	Resume	Actions
<input type="checkbox"/>	Katherine	Jackson	Interview	August 14, 2015 1:00 pm		No				Actions

Remaining applicants are in the workflow state of Interview.

Linc Butler, you have 0 messages. Applicant Review Search Results: Next

Postings / ... / Employee Relations Counselor (TLB11) (Closed) / Applicant Review / John Smith Interview

Job application: John Smith (SPA)

Current Status: Interview

Application form: Application

Full name: John Smith

Address: 123 Fake Street, Austin, TX, United States of America

Username: jsmith

Email: jsmith@zed.zed

Phone (Primary): (555) 555-5555

Phone (Secondary):

Position Type: SPA

Section/Unit: Employee Relations

Created by: John Smith

Owner: Applicant Reviewer

Take Action On Job Application

WORKFLOW ACTIONS

Keep working on this Job application

Interviewed, Not Hired (move to Interviewed, Not Hired)

Send to Dean/Vice Chancellor (move to Dean/Vice Chancellor)

Click Interviewed, Not Hired.

Take Action

Interviewed, Not Hired (move to Interviewed, Not Hired)

Reason (required)

Please select

Submit Cancel

Non-selection reason is required.

Take Action

Interviewed, Not Hired (move to Interviewed, Not Hired)

Reason (required)

Please select

Declined Offer - Other employment.

Declined Offer - Reason not specified.

Declined Offer - Salary.

Interview - Interview showed inconsistency with application information.

Interview - Interview showed lack of effective communication skills.

Interview - Interview showed lack of sufficient directly related experience and/or education.

Interview - Interview showed lack of understanding of scope of position's duties.

Interview - No show.

Priority Selection - Selected candidate with promotional priority.

Choose appropriate non-selection reason.

You can then route the selected candidate to the next step in the candidate approval workflow by hovering your cursor over the **Take Action On Job Application** button located in the top right-hand corner of the selected candidate's Job Application view and selecting the appropriate next step. In this example, the next step in the workflow is **Send to Dean / Vice Chancellor**. You will then be required to enter comments describing why the selected candidate was the most qualified candidate in the applicant pool:

Postings / ... / [Employee Relations Counselor \(TLB11\)](#) (Closed) / [Applicant Review](#) / Bruce Campbell Interview

**Job application: Bruce Campbell (SPA)**  
 Current Status: Interview  
 Application form: Application

Full name: Bruce Campbell  
 Address:  
 107 Elm St.  
 Greensboro , NC  
 United States of America  
 Username: bcampbell  
 Email: tbutler@zed.zed  
 Phone (Primary): 336-336-3336  
 Phone (Secondary): 336-285-2222  
 Position Type: SPA  
 Section/Unit: Employee Relations

Created by: Bruce Campbell  
 Owner: Applicant Reviewer

**Take Action On Job Application**

- Keep working on this Job application
- Interviewed, Not Hired (move to Interviewed, Not Hired)
- Send to Dean/Vice Chancellor (move to Dean/Vice Chancellor)

**Take Action**

**Send to Dean/Vice Chancellor (move to Dean/Vice Chancellor)**  
**Reason (required)**  
 Please select

Selection reasons are required.

Submit Cancel

**Take Action**

**Send to Dean/Vice Chancellor (move to Dean/Vice Chancellor)**  
**Reason (required)**  
 Enter Comments  
 Explanation:

Submit Cancel

Once the selected candidate has been approved by all levels of your School, College, or Division, the next step in the workflow is to route the selected candidate to DHR for **EEO Review** by the Director of Employee Relations and Affirmative Action Officer:

Postings / ... / [Employee Relations Counselor \(TLB11\)](#) (Closed) / [Applicant Review](#) / Bruce Campbell Dean/Vice Chancellor

**Job application: Bruce Campbell (SPA)**  
 Current Status: Dean/Vice Chancellor  
 Application form: Application

Full name: Bruce Campbell  
 Address:  
 107 Elm St.  
 Greensboro , NC  
 United States of America  
 Username: bcampbell  
 Email: tbutler@zed.zed  
 Phone (Primary): 336-336-3336  
 Phone (Secondary): 336-285-2222  
 Position Type: SPA  
 Section/Unit: Employee Relations

Created by: Bruce Campbell  
 Owner: Dean/Vice Chancellor

**Take Action On Job Application**

- Keep working on this Job application
- Return to Interview (move to Interview)
- Interviewed, Not Hired (move to Interviewed, Not Hired)
- Send to EEO Review (move to EEO Review)

**Take Action**

**Send to EEO Review (move to EEO Review)**

Submit Cancel

## Hiring Proposal

Once you have been notified that your selected candidate has been moved to the workflow state of **Recommended for Hire** by the Director of Employee Relations and Affirmative Action Officer, you can then start a Hiring Proposal by navigating to the Job Application view for that selected candidate and clicking on the **Start Hiring Proposal** link located on the top right-hand corner of the page:

Postings / ... / Employee Relations Counselor (TLB11) (Closed) / Applicant Review / Bruce Campbell Recommend for Hire

**Job application: Bruce Campbell (SPA)**  
Current Status: Recommend for Hire  
Application form: Application

Full name: Bruce Campbell  
Address:  
107 Elm St.  
Greensboro , NC  
United States of America  
Username: bcampbell  
Email: tlbutler@zed.zed  
Phone (Primary): 336-336-3336  
Phone (Secondary): 336-285-2222  
Position Type: SPA  
Section/Unit: Employee Relations

Created by: Bruce Campbell  
Owner: Applicant Reviewer

View Posting Applied To  
Preview Application  
Evaluate Applicant  
**Start Hiring Proposal**

Then select the position description you would like to hire the selected candidate into from the list displayed on the Selected Position Description page. You can search for the desired position description by keyword or position attributes including but limited to position title, position number, and position status:

Postings / ... / Applicant Review / Bruce Campbell (Recommend for Hire) / New Hiring Proposal

**Selected Position Description**  
• Accounting Manager

**Position Descriptions**

Open Saved Search Search: Search More search options

SPA Position Descriptions

Saved Search: "SPA Position Descriptions" (32 Items Found)

Previous 1 2 Next

Working Position Title	Position Number	Employee First Name	Employee Last Name	Position/Classification Title	Department	Supervisor	Status	(Actions)
<input type="radio"/> Administrative Support Spec	000018	Belinda	Macklin	Administrative Support Spec	HR Systems	Asst VC-Human Resources (Linc Butler)	Active	Actions
<input type="radio"/> Human Resources Specialist	000025	Ester	Jones	Human Resources Specialist	Benefits	Human Resources Consultant (Nanita Cole)	Active	Actions
<input type="radio"/> Human Resources Consultant	000033	Nanita	Cole	Human Resources Consultant	Benefits	Asst VC-Human Resources (Linc Butler)	Active	Actions
<input type="radio"/> Human Resources Specialist	LC0040	Lonnice	Crofts	Human Resources Consultant	Recruitment and Retention	Asst VC-Human Resources (Linc Butler)	Active	Actions
<input type="radio"/> Human Resources Consultant	000051	Amy	Braun	Human Resources Consultant	Classification & Compensation	Asst VC-Human Resources (Linc Butler)	Active	Actions
<input type="radio"/> Human Resources Consultant	000057	Courtney	Carey	Human Resources Consultant	Temporary Employment	Human Resources Consultant (Tammie Hill)	Active	Actions

When you locate the desired position description, select it by clicking the radio button to the left of the **Working Position Title**, then click the **Select Position Description** button located on the bottom left-hand corner of the page:

Postings / ... / Applicant Review / Bruce Campbell (Recommend for Hire) / New Hiring Proposal

**Selected Position Description**  
• Accounting Manager

**Position Descriptions**

Search: TLB11 Search More search options

SPA Position Descriptions

Ad hoc Search

**Working Position Title** **Position Number** **Employee First Name** **Employee Last Name** **Position/Classification Title** **Department** **Supervisor** **Status** **(Actions)**

☒ Employee Relations Counselor (TLB11) TLB11 Human Resources Specialist Employee Relations Asst VC-Human Resources (Linc Butler) Active Actions

Select Position Description



## Hiring Proposal – Hiring Proposal Tab

You will then be taken to the **Edit Hiring Proposal** view and can begin completing all required fields on the **Hiring Proposal** Tab. Information from the selected candidate's application, the posting, and the position description will be copied into the **Hiring Proposal** tab. Once all required fields are complete, click **Save** or **Next**:

Pending Requests / ... / Hiring Proposal / Employee Relations Counselor (TLB11) / Edit

**Editing Hiring Proposal**  
Hiring Proposal  
Hiring Proposal Summary

**Hiring Proposal**  
✓ Check spelling  
\* Required Information  
Candidate Information  
First Name Bruce  
Middle Name Ashley  
Last Name Campbell  
Primary Phone 336-336-3336  
Email tlbutler@zed.zed  
Social Security Number 5555  
Date Of Birth 09/10/1971

Save and Next buttons. Save Next >>

The Selected Candidate's application information will be copied in.

Position Information

Position Title	Employee Relations Counselor (TLB11)
Posting Number	SPA048
Classification Type	SPA
Approved Competency Level	Journey
Primary Purpose of Position	Test
Approved Salary	\$45,000
* Has the University's EEO Policy been followed in the recommendation of applicants for this position and documentary evidence to support this decision been filed with the Division of Human Resources?	<input checked="" type="radio"/> Yes <input type="radio"/> No This field is required.
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?	No

Position description information will be copied in.

Required field.

### Funding Source Detail

Indicate the funding source(s) for this position. Click on "Add Funding Source Details Entry" to enter budget and other required codes. Select "SAVE" after each entry. Please note that the annual amount budgeted must equal the requested salary.

If the position has more than one funding source, continue to select "Add Funding Source Details Entry" and "Save" until all sources are entered. Each time you add an additional entry, you will need to scroll down below the last saved entry to enter a new funding source.

\* State Appropriated Funding / Non-State Appropriated Funding

If non-state, select source of funding:

If other, designate source:

Is this position partially or fully funded on ARRA stimulus monies?

\* Budget Code

\* Fund   
Format: 6 digit number #####

\* Org   
Format: 5 digit number #####

\* Account   
Format: 5 digit number #####

\* Program   
Format: 3 digit number ###

Date Funds End

\* Annual Amount

\* Percentage of FTE

☐ Remove Entry?

[Add Funding Source Detail Entry](#)

**Funding Source information will be copied in from the Position description and can be edited.**

### Hiring Proposal Information

\* Reason For Selection of Candidate

Start Date

Actual Starting Salary

\* Is Background Check Required?  This field is required.

\* Is Background Check Complete?  This field is required.

\* Please Provide Any Background Check Detail

Hiring Proposal Number

\* Have references been checked?  This field is required.

\* Is Nepotism Certificate Required? If yes, please attach.  This field is required.

**Include detailed, job-related selection reasons describing why the selected candidate was the most qualified candidate in the applicant pool.**

**Ensure all other required fields are complete, then click Save or Next.**

[Save](#)

[Next >>](#)

## Hiring Proposal – Hiring Proposal Summary Tab

The **Hiring Proposal Summary Tab** allows you to perform a final review all information you've entered on the previous tab prior to sending the request to the next step in the approval workflow. Please review the details of the posting summary carefully before continuing.

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

SPA / ... / Bruce Campbell (Recommend for Hire) / Hiring Proposal / Summary

**Hiring Proposal: Bruce Campbell (SPA)** [Edit](#)

Current Status: Draft

Position Type: SPA  
Section/Unit: Employee Relations  
Applicant: Bruce Campbell  
Posting: Employee Relations Counselor (TLB11)

Created by: Linc Butler  
Owner: Linc Butler

Take Action On Hiring Proposal ▾

WORKFLOW ACTIONS

- Keep working on this Hiring Proposal
- Send to Department Head (move to Department Head)

Summary | History | Settings

Blue Circle Check

Hiring Proposal [Edit](#)

Click "Edit" to make edits to a tab.

Candidate Information

	Bruce
	Ashley
Last Name	Campbell
Primary Phone	336-336-3336
Email	tlbutler@zed.zed
Social Security Number	5555
Date Of Birth	09/10/1971

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 **Hiring Proposal Summary Tab** by clicking on the link in the left column:

Position Funding Information [Edit](#)

Click "Edit" to make edits to a tab.

Orange Circle Exclamation Point

Budget Advisory Approval

EPA and SPA positions that are funded in whole or in part by general state funds requires approval by A&T's Budget Advisory consideration of the Committee's review process, state below what mission specific, essential, and / or key objectives will not be met if the

Mission Specific, Essential and/or Key Objectives not Met without position

Test

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)":

SPA / ... / Bruce Campbell (Recommend for Hire) / Hiring Proposal / Summary

**Hiring Proposal: Bruce Campbell (SPA)** [Edit](#)

Current Status: Draft

Position Type: SPA  
Section/Unit: Employee Relations  
Applicant: Bruce Campbell  
Posting: Employee Relations Counselor (TLB11)

Created by: Linc Butler  
Owner: Linc Butler

Take Action On Hiring Proposal ▾

WORKFLOW ACTIONS

- Keep working on this Hiring Proposal
- Send to Department Head (move to Department Head)

Summary | History | Settings

Hiring Proposal [Edit](#)

Click on "Take Action On Hiring Proposal", then select routing action to move the request to the next step in the approval workflow.

Candidate Information

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:

The screenshot shows a 'Take Action' dialog box with a close button (X) in the top right corner. The main heading is 'Send to Department Head (move to Department Head)'. Below this is a text area labeled 'Comments (optional)'. At the bottom left, there is a checked checkbox labeled 'Add this pending request to your watch list?'. At the bottom right are 'Submit' and 'Cancel' buttons. Two red arrows point from text boxes to the form: one points to the 'Comments (optional)' text area, and the other points to the 'Add this pending request to your watch list?' checkbox.

**Comments are optional and can be viewed by the next level approver in the History tab.**

**Adding the action to your Watch List allows you to easily track and monitor the action’s progress.**

If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:

The screenshot shows the top of the application page with a red error bar at the top. The error message reads: 'Reason For Selection of Candidate' is required and All required fields must be set before transitioning. Below the error bar is the North Carolina A&T State University logo and navigation links: Home, Postings, Hiring Proposals, My Profile, and Help. A 'Watch List' button and an 'APPLICANT TRACKING' dropdown are also visible. A user profile for 'Linc Butler' is shown with a message count of 0 and a 'Supervisor' dropdown. A 'Take Action On Hiring Proposal' button is located at the bottom right of the header area. Two red arrows point from a text box to the red error bar.

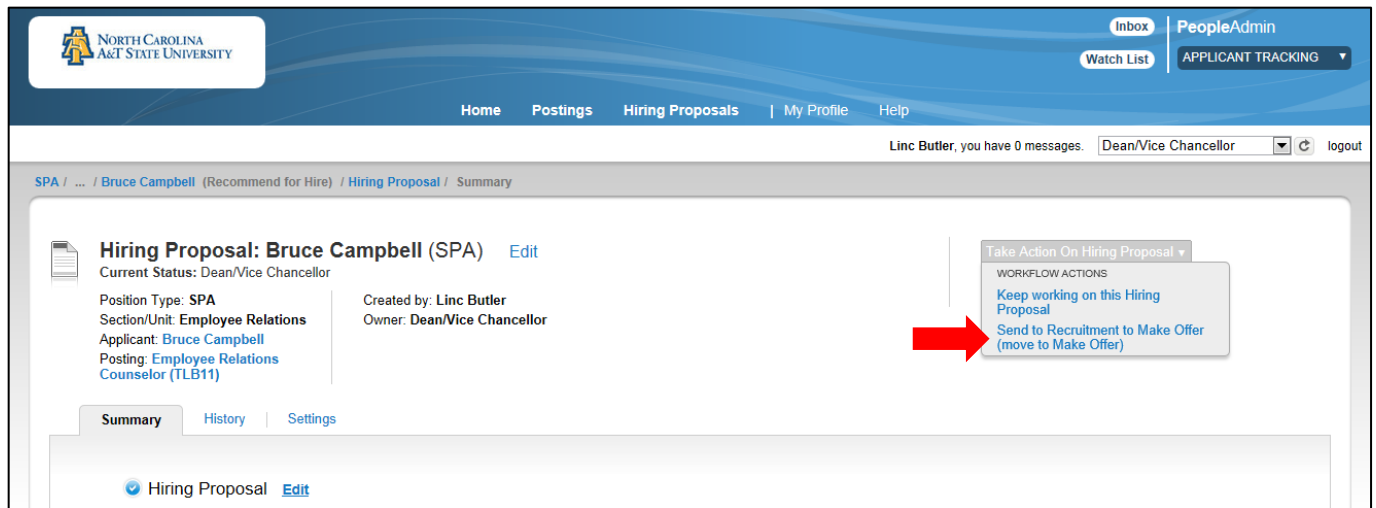
**Red bar indicating the required fields that need to be completed before submitting the request to the next step in the workflow.**

Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

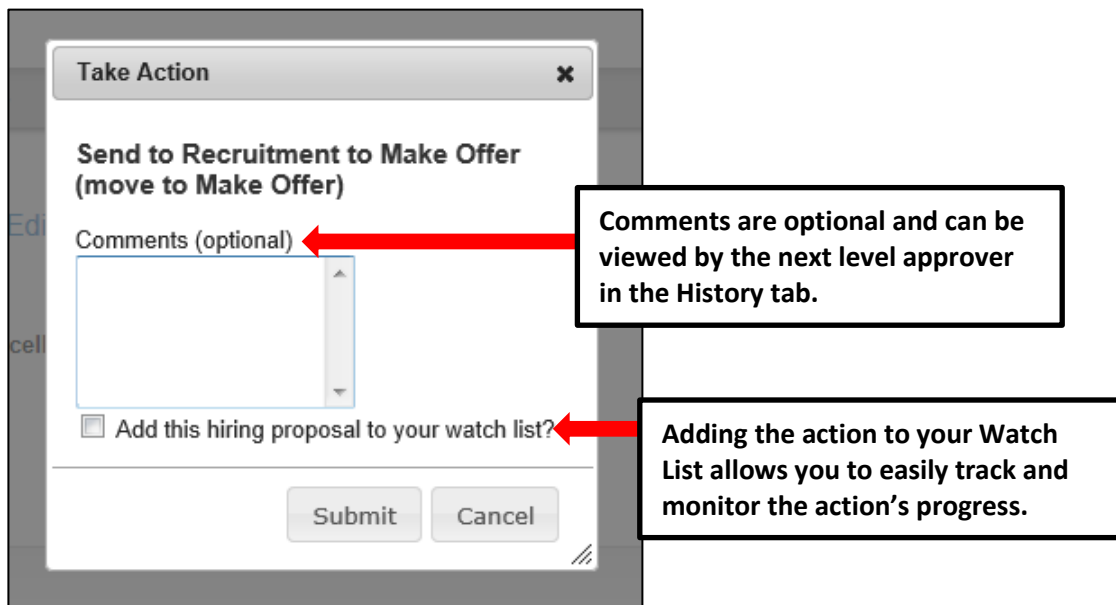
The screenshot shows the top of the application page with a green confirmation bar at the top. The confirmation message reads: 'Hiring Proposal was successfully transitioned'. Below the confirmation bar is the North Carolina A&T State University logo and navigation links: Home, Postings, Hiring Proposals, My Profile, and Help. A 'Watch List' button and an 'APPLICANT TRACKING' dropdown are also visible. A user profile for 'Linc Butler' is shown with a message count of 0 and a 'Supervisor' dropdown. A 'Print Preview' button is located at the bottom right of the header area. Two red arrows point from a text box to the green confirmation bar.

**Green confirmation bar indicating the Pending Request was successfully transitioned and added to your Watch List.**

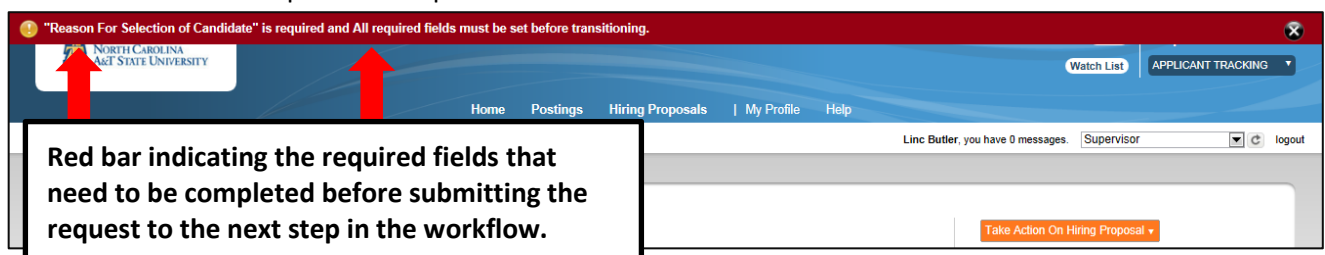
The next level approver (the Department Head in this example) will receive the pending Hiring Proposal request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable). Once the Hiring Proposal has been approved at all levels within your Division, School, or College, the next step in the approval workflow is to route the Hiring Proposal to Recruitment:



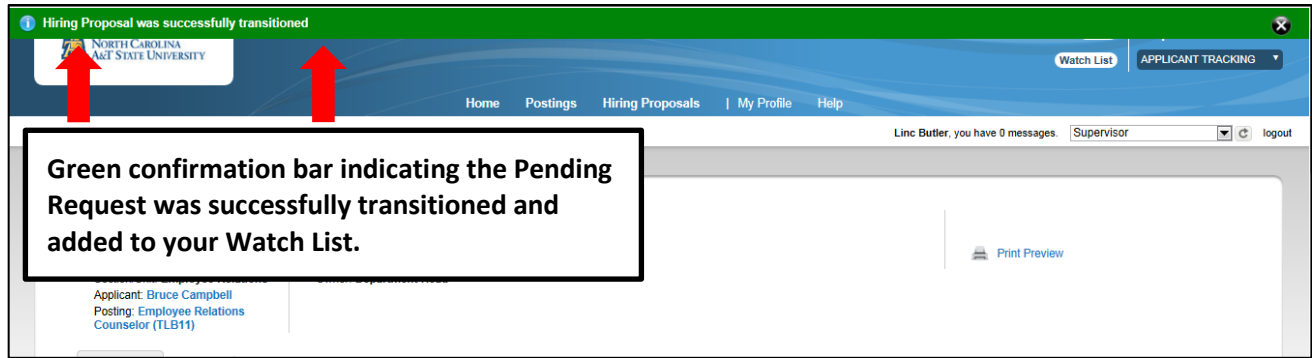
You will then see the following **“Take Action”** box. You can enter comments in the **“Comments (optional)”** field that will be viewable by any user the action is routed to, including the next level approver. You can also select for the action to be added to your Watch List. When you’re ready to send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



If a required field has been omitted, a burgundy bar at the top of the page will alert that edits need to be made. Omissions of required fields prevent submission and even cancellation:



Once the action has been successfully submitted, you will see a green confirmation bar at the top of the page:

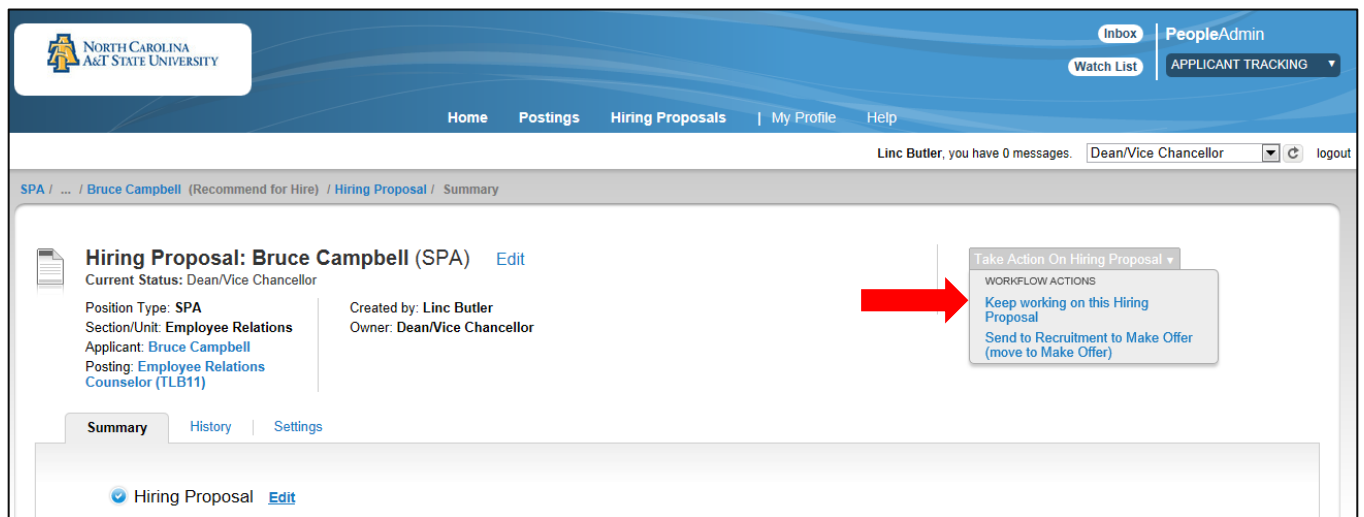


The next level approver (the Department Head in this example) will receive the pending Hiring Proposal request in their Inbox and an automatically generated e-mail notifying them that the request was transitioned to them. From the Inbox, the next level approver can open the pending request, review it, make changes (if necessary), and then either send it on to the next step in the approval workflow or return the request to the initiator (if applicable).

## Hiring Proposal - Saving to Return to a Pending Request Later

On the **Summary Tab** is an important menu item which should be selected if you need to stop a work session on the posting before submitting it to the next level for approval. Following this step will ensure that all your work is saved when you open the request for completion.

- 1) Click the “Save” button located in either the top or bottom right corner
- 2) Select “Summary” from the Tab List (illustrated above)
- 3) Select “Keep Working on this Posting”



- 4) Add any Comments into the window that opens (below) as notes to yourself, if desired.
- 5) Click “Submit”

The image shows a 'Take Action' dialog box with a close button (X) in the top right corner. The main heading is 'Keep working on this Hiring Proposal'. Below this is a text input field labeled 'Comments (optional)'. A red arrow points from a callout box 'Enter comments if desired.' to this field. Below the text field is a checkbox labeled 'Add this hiring proposal to your watch list?'. At the bottom of the dialog are two buttons: 'Submit' and 'Cancel'. A red arrow points from a callout box 'Submit when complete.' to the 'Submit' button. The dialog box has a standard Windows-style title bar and a small icon in the bottom right corner.

Take Action

Keep working on this Hiring Proposal

Comments (optional)

Enter comments if desired.

☐ Add this hiring proposal to your watch list?

Submit when complete.

Submit Cancel

The **Hiring Proposal** can be located when you log into the Applicant Tracking module again as the same **User Type** you used to begin the action.