Modify Existing Position (Minor changes) - Not Advertising

Use this checklist when making minor changes to position duties, working title, supervisor information, user access, and other modifications not affecting the positions role assignment, major changes in duties, and/or requests for in-band adjustments. It is used only for existing position descriptions already entered into PeopleAdmin. Positions modified under this checklist are not routed through the approval process.

<table>
<thead>
<tr>
<th>Login to PeopleAdmin by going to the Human Resources home page and clicking on the PeopleAdmin link under Quick Links or by logging into the RU portal; click on the Employee tab and clicking on the PeopleAdmin link under Quick Links on the right hand side of the screen. The username and password is the same as your RU login information.</th>
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<td>On the Welcome screen, check the welcome message to make sure you are in the correct user type for the action you want to do. For example, to begin an action you will need to be in user type level 1, level 2, etc. rather than Evaluating Supervisor. To change the user type, click on Change User Type under the Admin section on the left side of the screen. Select the appropriate user type and click Change Group.</td>
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<td>On the Welcome screen, click Begin New Action under the Position Descriptions heading on the left side of the screen.</td>
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<tr>
<td>Click the Start Action link under Modify Existing Position Description.</td>
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| The position can be searched using multiple identifiers, i.e. role title, position number, working title, employee ID number, employee first name, or employee last name. The information must be entered exactly as it is on the position description. Enter information in one field and click Search.  

*TIP: Employee Last Name or Position Number is often the most readily available position identifiers.* |
| Select the position to be modified by clicking Start Action under the role title. The position will be displayed as a series of 10 tabs. |
| The first two tabs display the approved classification and current job description. These tabs cannot be user modified. |
| The third tab lists the current role assignment. Since you are not requesting a formal review for a possible role change, proceed to the fourth tab, Position Details to begin modifications. |
**POSITION DETAILS.** Review the position details carefully, making changes as necessary. Items with an * (asterisk) are required before the system will allow you to continue to the next page. However, always review and update all data items to ensure a complete and accurate position description. When modifications are complete click **Continue to Next Page >>**.

*TIP:* Employee Name, Position Number, and Role Title are updated by HR only.

*TIP:* If the working title and/or supervisor are changing ensure documentation has been submitted to HR to change those data elements in Banner and State data systems.

*TIP:* If an individual’s name is not listed for Department User Access that means the individual has not been granted PeopleAdmin access. See the checklists for User Access to PeopleAdmin for guidance.

*TIP:* If the designated supervisor’s name is not listed in the drop down menu he/she may not have PeopleAdmin user access or departmental access to the particular department.

**BUDGET INFORMATION.** If needed, FOAP changes can be made on the Budget Information tab by clicking **Edit.** Enter the entire four part FOAP. If no changes are necessary then click **Continue to Next Page >>**.

**MAJOR RESPONSIBILITIES OF THE POSITION.** Review and/or edit the percent of time and job duties/responsibilities on the **Major Responsibilities of Position** tab by clicking **View** or **Edit.** You may also add or delete entries. When finished click **Continue to Next Page >>**.

*TIP.* Percent of work time for all work tasks must equal 100%.

*TIP.* To facilitate the performance planning and evaluation process, position descriptions for classified employees should list at least 5 major responsibilities of the position. PDs for A/P Faculty should list 5 to 8 major responsibilities (ref A/P Faculty Handbook).

*TIP.* Changes to work tasks may prompt an update of the employee’s performance plan.

**EMPLOYMENT CONDITIONS.** Review and/or edit employment conditions and requirements at this tab. When finished click **Continue to Next Page >>**. Each item listed should be addressed with a positive response for each “radio button.”

**REQUISITION FORM.** This tab is completed only when the action is to advertise the position. Since the action is modifying an existing position – not advertising just click on **Continue to Next Page >>**.
**COMMENTS.** On the **Comments** tab, enter comments that explain what was modified such as Supervisor change or Minor changes to job duties. When finished, click **Continue to Next Page >>**.

**TIP.** This is an extremely important tab. Please provide an explanation of what data elements are being changed and/or updated even if the only items being modified are for grammatical/spelling errors. A brief descriptive statements helps facilitate the approval process and lets everyone in the approval process know exactly what is going on and what their required action, if any, may be.

On the **View Modify Existing Position Description Summary** screen, review the modified position description. If additional changes are needed, click **Edit** which brings you back to the tabs. When you finish modifying the position description, click on **Save Action Without Submitting** and click **Continue**.

You will then click **Confirm** and will see a message indicating the status of the Action has successfully been changed to **Action Saved Not Submitted**.

**TIP.** The action has not been saved until the confirmation is displayed.

**TIP.** The only reason to send the PD to the next level would be for review by the next level if required by your department’s internal processes. Normally, modifying position descriptions for minor corrections and modifications does not warrant sending it to the reviewing official.

After the action has been **saved without submitting** send an email to the respective HR Generalist for your area with the action number, employee’s name, position number and what information was modified, i.e. supervisor changed, minor changes to job duties, etc. The HR Generalist will approve the modified position description.

**TIP.** The action number is generated by the system the first time you save your work while modifying the position. Locate the action number by clicking on **Search Actions** under **Position Descriptions** section. Search by any position identifier (employee name or position number) and ensure that the Action Saved Not Submitted box is checked. Click **Search**.

**TIP.** The role title, working title, status, action number, position number, employee last name and date of last action are displayed on the **View Actions** screen.

**TIP.** For supervisor changes, an EPAF must be submitted.