Guide for Approvers

- When are approvals required?
- How an approval process is setup?
- How will you know when you need to approve something?
- What are the important details on a position description?
- How do you approve a position description?
- How to check the status of a position description?
- What are the important details of a requisition?
- How do you approve a requisition?
- How to check the status of a requisition?
- What are the important details on the offer card?
- How do you approve an offer card?
When are approvals required?

1. Position Descriptions
   a. Creating a new position description
   b. Updating an existing position description (modification or reclassification)

2. Requisitions

3. Offer Card Details

How an approval process is setup?

The number of approvers varies by Department. The approval process is set up by the user that initiates the Position Description, Requisition, or Offer Card. It is important to make sure that the individual setting the approval process is aware of which users should be included. Each level needs to have one user identify; one user in the Dean’s Office or one user in the VP’s Office (I’m not sure what you are saying?). If you have questions about the approval process or need to make changes, contact the HR Recruiter for your department. All position descriptions begin with and end with HR Compensation and Classification (the system will default HR in the first approval slot). All requisition and offer cards will begin and end with the HR Recruiter assigned to your department.
How will you know when you need to approve something?

- System emails are automatically sent when a Position Description, Requisition, or Offer Card is awaiting your approval. From your Home Screen, you will see links to the actions pending approval.
What are the important details on a position description?

This may vary depending on your role in the approval process; some of the important parts HR would like to point out are identified below.

- **Reason for the request** (located at the top of the screen)

  - Create Position Description- You are creating a position, but you will not be posting immediately.
  - Create Position Description and Post- You are creating a new position and would like to post immediately following the approval of the position description. This option does not automatically post the position for recruitment; a requisition will need to be submitted. (If the requisition is submitted within 30 days of the position description approval, the requisition will not be required to go through the approval process again. If the length of time has exceeded 30 days, the HR Recruiter will send the requisition through the approval process before posting.)
  - Update Position Description- You are making changes to the position, but there will be no recruitment.
  - Update Position Description and Post- You are making changes to the position and would like to post immediately following the approval of the position description. This option does not automatically post the position for recruitment; a requisition will need to be submitted. (If the requisition is submitted within 30 days of the position description approval, the requisition will not be required to go through the approval process again. If the length of time has exceeded 30 days, the HR Recruiter will send the requisition through the approval process before posting.)
• HR requires a **justification section** for every updated or new position description. The justification section should explain the details of the request.

```
Justification for the Request
(Please include the supervisor's name and position number in the notes section):
```

• **Classification Details** are displayed in the yellow Position Classification Text box. (The classification is determined and managed by HR).

```
Classification Title: Office Associate I
Position Class Code: R0252
EEO Code: 50 - Clerical or Secretarial
Census Code: S66
SOC Code: 43-9061
IPECS 5
Job Group: S6 - Office/Clerical Support Staff V
FLSA Code: Non-Exempt (Hourly)
Job Category:
Pay Grade/Pay Range: 52 Hourly (non-exempt) - Minimum - $8.52 Midpoint - $11.25
Job Summary: Under moderate supervision, performs a variety of general office, administrative or secretarial duties with some variety and complexity. Typical duties may include receiving, screening and routing telephone calls, mail and visitors; arranging itineraries/agendas, maintaining files (database and/or hardcopy), type a variety of material, faxing, copying, maintaining inventory of office supplies and materials, and acting as a daily liaison to other offices.
Required Minimum Qualifications: High school diploma or GED and one year of general office experience or an associate's degree or higher. Basic understanding of personal computers and other basic office equipment. Good organization, communication and public relations skills.
```

• **To view** the details click on the green plus sign.
• The **Position Details** are also displayed in a yellow text box. The details in this box are pulled from Banner. (To update the supervisor information, contact the HR Compensation and Classification Specialist or your HR Recruiter with the supervisor’s name and position number. If you are submitting a new position description, this information needs to be included in the notes section.)

```
Position no: 979805
Position: Office Pool
Division: Academic Affairs
College: Arts and Sciences
Department: 204611 - American Studies
Employee Name:
CWID:
Supervisor:
```

• The rest of the position description contains department and position specific information.

• In addition to the position information screen, each position description has a notes section, a documents section, and a revision history section. Any user in the approval process can add a note. Information entered into the Notes section will be listed in chronological order and maintained for historical purposes. (These are located at the top of the position description screen)

- Includes notes added and the name of the user that added the note.
- Includes attachments (Office Associate Job Family Forms, Org Charts, etc.)
- Includes detailed history of every time the position description was saved and/or approved.
How do you approve a position description?

- Click on the **approved button** at the very bottom of the position description screen.

- A position description is not approved until it has completed the approval process. Changes or comments can be added at any point during the approval process. Any user in the approval process can decline the position description (a reason is required). Questions about the classification or a declined position description need to be directed to the HR Compensation and Classification Specialist.

How to check the status of a position description?

- From the home screen, select Manage Position Descriptions and Create Requisitions.
- Use the search criteria to find the position description (position #, classification title, or incumbent’s name).
If the approval status still shows “Pending Approval” the position description has not completed the approvals.

To check the status of a position description, click on view and scroll to the bottom of the screen to see which approver the position description is currently assigned to.

<table>
<thead>
<tr>
<th>Approval process:*</th>
<th>5 Approvers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. HR:</td>
<td>Heather Hubbard [✓] Approved 9 May 2014</td>
</tr>
<tr>
<td>2. 2nd approver:</td>
<td>Katherine Watkins [✓] You are here</td>
</tr>
<tr>
<td>3. 3rd approver:</td>
<td>Lisa Lindquist-Dorr</td>
</tr>
<tr>
<td>4. 4th approver:</td>
<td>Lisa Rhiney</td>
</tr>
<tr>
<td>5. HR:</td>
<td>Heather Hubbard</td>
</tr>
</tbody>
</table>

**What are the important details on the requisition?**

This may vary depending on your role in the approval process; some important items to note are identified below.

- **The type of search** the department has requested. If a waiver is requested, the department is required to identify the type of waiver and the justification for the waiver.

```
Type of search (If waiver you must contact your assigned HR Recruiter before you proceed):*

Regular
Select
Regular

Type of Waiver:

Campus Only
College/School/Department Only
Waiver
Reappointment

If waiver is selected include justification for the waiver and name of applicant that will be waivered into position:
```
• **Position information:**
  - Identifies how many positions are being recruited
  - Identifies if it is a replacement or a new position
  - Identifies the position number to be filled

![Position Information](image)

• **Committee Details:**
  - Identifies the committee chair
  - Identifies the committee members
  - Identified the race and gender of the committee

![Committee Details](image)
• **Advertising Details**
  
  - Identifies if the position will be advertised outside of the UA jobs page
  - Identifies where the position will be advertised
  - Identifies the text that will be used for advertising (the HR Recruiter reviews, edits, and sends an approved Ad Copy to the hiring manager)

![Advertising Details](image-url)
• In addition, the requisition has a notes and a documents section. (Located at the top of the requisition screen).

How do you approve a requisition?

• Click on the **approved button** at the very bottom of the requisition screen.

• A requisition is not approved until it has completed the approval process. Changes or comments can be added at any point during the approval process. Any user in the approval process can decline the requisition (a reason is required). Questions about the requisition should be directed to your HR Recruiter.
How to check the status of a requisition?

- From the sidebar, select Manage Requisitions
- Open the requisition, scroll to the bottom of the screen to see what user has the requisition assigned to them for approval.
What are the **important details** on the offer card?

This may vary depending on your role in the approval process; some important items to note are identified below.

- **Requisition Details**
  - Identifies the Classification, Department, and Pay grade of the position.

The “i” can be used as a quick link to the requisition screen.
• **Position Details**
  
  o Identifies the expected start date, end date (if less than 12 months), hiring rate or salary (by year, month, or hour), and salary details if the applicant is a current employee.
- **Comments and justification section**
  
  o Includes justification for selecting the candidate, salary rationale, and notes from other approvers/users.
How do you approve an offer card?

- Click on the **approved button** at the very bottom of the offer card screen.

- An offer is not approved until it has completed the approval process. Changes or comments can be added at any point during the approval process. Any user in the approval process can decline the offer (a reason is required). Questions about the offer or a declined offer should be directed to your HR Recruiter.