

WorkforUM Training

Part 2: Requests to Fill Existing Positions

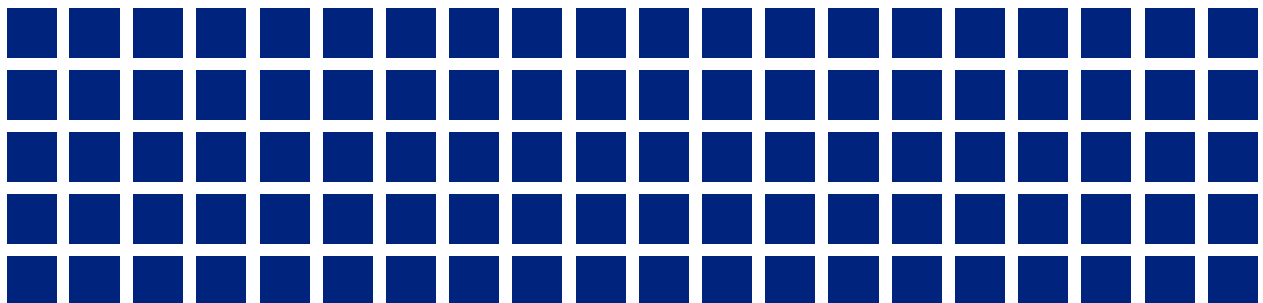


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Types of Requests

The most common action taken in WorkforUM is to request to fill a position that already exists within a department. There are two types of existing positions that can be requested to fill within WorkforUM. These are Staff/Administrative Executive/Contract Coach positions and Full-Time Faculty/Academic Executive positions. Part-time faculty positions are automatically posted annually and do not require a request to fill action.

Staff/Administrative Executive/Contract Coach positions refer to regular pay plan positions for administrative/professional and clerical/support staff. Administrative executive positions refer to upper-level administrative positions such as vice presidents. These requests are fielded by the Human Resources office.

Full-time faculty positions refer to regular positions held by the faculty of the University. Academic executive refer to upper-level academic positions such as deans. These requests are fielded by Faculty Administrative Services.

Athletic contract positions refer to any position in athletics that works under a contract that must be vetted through the University's Office of Legal Counsel. In most cases, these positions are jointly handled by Athletics and the Human Resources and Institutional Equity offices.

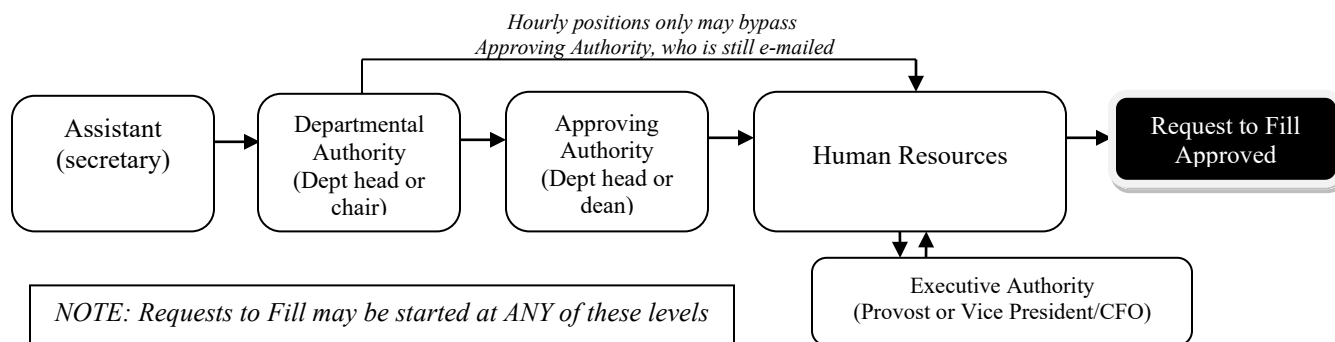
Request Routing

The type of position for which a request to fill is being completed will determine the workflow it will follow in getting approved. Workflows typically involve going from the departmental level through the approving, executive, and posting authorities, as appropriate.

Staff/Administrative Executive/Contract Coach requests to fill typically begin with either an Assistant or a Departmental Authority making the initial request, though any step in the workflow may begin one. If an Assistant (generally a secretary) begins the request, it can then only be submitted to that Assistant's Departmental Authority (the department head or his/her proxy). Whether the Departmental Authority begins the request or merely reviews/approves the request submitted by the Assistant, the record will then be submitted to the next appropriate level.

- Requests to fill **non-exempt** positions may be routed directly to Human Resources office by the Departmental Authority. Only Human Resources can route a request to fill to the Executive level, if required. HR will then post the position once approval has been granted.
- Requests to fill **exempt** positions must be routed to the Approving Authority by the Departmental Authority. Should existing hiring climates on campus make the need for Executive Authority level approval a requirement, Human Resources will route this request to the Executive Authority at the appropriate time. HR will then post the position once approval has been granted.
- **PLEASE NOTE:** In many cases, most often with non-academic departments, the Departmental Authority and Approving Authority may be composed of the same individuals. Where academic departments generally have three levels of approval (chair to dean to provost), most non-academic areas have just two (director to vice president/CFO). In such cases, the Departmental Authority may end up submitting records to his or herself. This can be avoided when requests are begun at the Approving Authority level, when possible. The User Type dropdown box in the upper-right corner of WorkforUM can be used to toggle between user roles in the system.

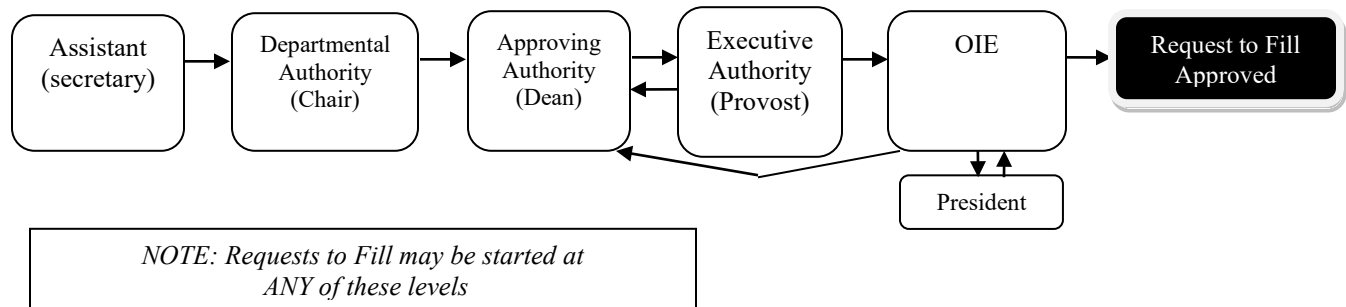
Request to Fill Staff/Administrative Executive/Contract Coach Position Workflow



Full-time Faculty/Academic Executive requests to fill also typically begin with either an Assistant or a Departmental Authority making the initial request, though any step in the workflow may begin one. However, the request is ultimately routed differently than an Staff/Administrative Executive/Contract Coach request.

If an Assistant (generally a secretary) begins the request, it can then only be submitted to that Assistant's Departmental Authority (the departmental chair or his/her proxy). Whether the Departmental Authority begins the request or merely reviews/approves the request submitted by the Assistant, the record will then be submitted to the Approving Authority. The Approving Authority for faculty positions is always the Dean or his/her proxy. If approved, the Dean will submit the request to the Executive Authority (always the Provost or his/her proxy for faculty positions). If approved by the Executive Authority, the request will be forwarded to Institutional Equity. Once final Institutional Equity approval is obtained, Faculty Administrative Services may begin the process of posting the faculty position announcement. (More information about the cyclical nature of the faculty hiring process can be found [online](#). There may also be specific hiring guides available in various colleges, available via the respective Deans' offices.)

Request to Fill Full-Time Faculty/Academic Executive Position Workflow



Keep in mind that **Part-Time Faculty requests to fill** are not required as those jobs are posted automatically. Academic departments will be contacted annually in January for their requirements for these automatic postings.

Completing a Request

To begin completing a Request to Fill, you may wish to begin by verifying that you are logged in under the appropriate user type. In the upper-right of the WorkforUM screen, your current role is specified in a dropdown box at the top. If you need to change user type, select a different role from the dropdown box and click the refresh arrow.

To start your Request to Fill, you will need to navigate to the Position Management module of the system. This module always features a header image that is orange in color. In the far upper-left portion of the screen, choose the three dots icon and choose **Positions**. Selecting this option will reset the screen to the “orange side” of the system.

Across the top menu, roll your mouse over the **Positions** tab. A fly-out menu will appear, and from this menu you will either select **Staff, Administrative Executive, & Contract Coaches** OR **Full-Time Faculty & Academic Executive**. Clicking either of those options will produce a search results list with all corresponding positions to which you have access. Locate the position you are interested in filling and click that position’s title in the first column. (You need not click the checkbox.)

After selecting the position of your choice, the full position description on file is retrieved. You may review this description to ensure you have selected the appropriate position. In the upper-right section of the screen, you will see a list of available actions to take on this position. In this case, you would select the **Request to Fill Position** option. Doing so gives you a warning message that proceeding will lock this position to other actions until this action is completed. Acknowledge that message by clicking **Start**, and then you are in the body of the request to fill.

Request to Fill actions differ somewhat between **Staff, Administrative Executive, & Contract Coaches** and **Full-Time Faculty & Academic Executive** positions, so there are some tabs and fields that will appear for one position type but not for another. These differences will be highlighted throughout this training manual.

You are now on a screen with a series of stacked tabs on the left of the screen. You will need to proceed through each of these tabs in order to complete your initial request. Each of these tabs and its requirements will be discussed in this training individually.

Job Description Tab (Staff/Administrative Executive/Contract Coaches) or Position Description Tab (Full-Time Faculty/Academic Executive)

This tab contains much of the key information related how your position’s information will appear on your job posting. The first field that must be completed is the hiring department for this position. This is the actual hiring department that will appear on the posting, giving certain organizations such as grants to have a more general department name displayed to the public. Select the appropriate value from the dropdown box. The next section is related to the position itself and the values that it possesses as a member of a certain job classification. Under the University’s pay plan beginning in 2012, the key to this position’s place in the pay plan is the PCLS code. The PCLS code and title are displayed in the next two fields. Several fields on this tab will be automatically populated based on values assigned to that PCLS code.

You will see three title fields displayed for your position. The PCLS title directly correlates to the PCLS code. The Banner Title is a 30-character max field that reflects your position’s title

within the Banner system. Because of this field's space limitations, abbreviations will often appear. The Advertised Title field allows you to spell out these abbreviations, making a much clearer job title viewable to the applicant. Keep in mind that ONLY the Advertised Title is displayed to the applicant. You may make this advertised title more specific if you wish. For example, the Banner title might be "Asst Professor," but the Advertised Title might be "Assistant/Associate Professor of British Literature."

The Salary (Internal View) field allows you to communicate any budgetary limitations or scenarios to the other approvers of this action. This field is NOT viewable to the applicant.

The Campus Location field allows you to indicate at which University location this position is primarily located. This should help applicants find positions of geographical interest to them.

The Work Schedule field appears for Staff/Administrative Executive/Contract Coaches positions and should be completed even if the position works a standard Monday-Friday 8am-4:30pm schedule. If your position works an atypical schedule or requires overtime during peak periods, you would indicate that in this field.

A key field for faculty/academic executive/athletic contract positions is the Position Summary field. This field only appears for these job types and is a free-form field where the department can communicate the duties of the position, as well as more general information about the University and the city. Consider this a "catch all" field for your position's general information. It appears to the applicant as written.

The Minimum Classification Qualifications field is automatically populated based on your position's PCLS code. This is a statement of the minimum education and experience for all positions within your position's PCLS designation and is not changeable. However, you will state in the Minimum Position Qualifications field what the minimum education and experience qualifications are to be for your specific position. You can keep the default values from the classification, or you may raise them slightly should your position have additional requirements that you can defend if questioned. Keep in mind that your minimum position qualifications may not be LESS than the minimum classification qualifications, nor can they surpass them greatly. Only the Minimum Position Qualifications field is displayed to the applicant. In order to use a given item as a disqualifying factor, that item should be listed in this section.

The Special Conditions field remains in place should there be unusual circumstances related to your position of which you would like to alert applicants. For example, a grant-funded may have a future funding statement in this field. Keep in mind that unusual schedules and campus locations now have their own fields, so this information would not need to go under Special Conditions any longer.

The Working Conditions field is pre-populated based on the PCLS code, but if your position has additional working conditions beyond these defaults, you may list them in the Additional Working Conditions field. Both of these fields display to the applicant.

If the position you are requesting to fill will be supervising other positions, please include a basic statement to that effect in the Positions Supervised field.

Next, you will see a field that asks for the contact information for an individual within the department whom other authorities in the workflow could contact with additional questions should the need arise. This contact information is *not* viewable by applicants.

The last field is the Hiring Range field, and this salary field WILL display to applicants. The values that initially appear will show a minimum and midpoint salary for this position's PCLS code, which should depict a very wide range. You may either keep this range in place, or change it to say something general like "Open," "Commensurate with education and experience," "Competitive." Keep in mind your statements in this field WILL be viewable to the applicant, and your entries will be reviewed prior to being posted.

Major Duties and Responsibilities Tab (Staff/Administrative Executive/Contract Coaches ONLY)

The **Major Duties and Responsibilities** tab only appears for Staff/Administrative Executive/Contract Coach positions. This tab lists the specific duties that are expected from this individual position. It has been pre-populated with the duties from the University's previous pay plan. When requesting to fill a position for the first time in the upgraded WorkforUM, departments must indicate what percentage of time this position will be performing each specified duty. Most duties will tend to be in the 10%-25% range. Similar to previous fields, departments are now empowered to make modifications to these duties and their corresponding percentages. As well, you may add a duty or delete a duty as appropriate. All duties must also be marked as either Essential or Marginal. In most cases, most duties are listed as Essential.

Please be sure that your duties are modified so drastically that a reclassification of the position would be in order. This editability is meant to provide applicants with a more specific idea of this job's duties without departments trying to turn the position into something it is not.

Keep in mind that the system does not automatically calculate your percentage totals; please double check and make sure your percentages add up to 100%.

Applicants to your position will only see the duties themselves, not the percentages or Essential/Marginal designations.

After finalizing your entries, if any, click **Next** to save and move to the next tab.

Supplemental Documentation Tab

This tab allows you to upload pertinent documents related to your Request to Fill. Although the list of documents is lengthy on this tab, there is usually only one document that might need to be uploaded here, and that is the Short/Long Form External Ad. This is the text of any external advertisement that you may be placing in academic journals, etc., and its wording must match what you have entered on the WorkforUM request to fill. This external ad is typically only used for full-time faculty and academic executive positions. To upload your external ad, mouse over the Actions link on the far right, and you will have choices to upload a file from your computer or key the information in directly. Once you have done so, confirm your upload.

After making your entries, if any, click **Next** to save and move to the next tab.

Requisition Form Tab

The **Requisition Form** tab allows you to indicate the date you would like your posting to activate to the public. The posting date is the date that the job announcement will first be seen by the public, beginning at midnight on that date. By clicking in this field, you will be able to choose a date from the widget that appears and your selection will be automatically formatted to the current format. The closing date is the date that the online announcement will expire and close to the public. This will happen after 11:59 p.m. on the supplied closing date. Posting for an advertisement must be at least five (5) working days for any staff position, though a longer posting period can be requested. Faculty and executive positions are typically advertised for much longer than 10 days. Please allow for approval time when stating your anticipated posting dates. Many faculty and executive positions may require checking the “Open Until Screening Begins” box, which means the system will not cause the job posting to automatically expire; rather, Human Resources must be contacted and told to manually remove the posting at the appropriate time. Keep in mind that any applications received while a job posting remains online **MUST** be evaluated before a hiring proposal may be started. If you do wish to use the May Continue Until Filled checkbox, do NOT enter a value in the Closing Date field. Staff/Administrative Executive/Contract Coaches positions typically do not use the **Open Until Screening Begins** checkbox.

The Special Instructions to Applicants field allows you to communicate any special or unusual information to your potential applicants. They will see this information prior to applying for the position. If you have specific documents you would like applicants to provide in the “Other Document” section of the upcoming Applicant Documents tab, you could indicate that information here.

The requisition form also has a free-form text-entry field in which you can indicate where you plan to advertise this position (other than WorkforUM). Complete this section appropriately given the position you are requesting to fill. Institutional Equity will need to ensure that you are casting your net as widely as possible to attract a diverse applicant pool. Keep in mind all external advertisements are funded by your department. All full-time faculty and academic executive positions are automatically posted on HigherEdJobs.com. Monthly and administrative executive positions may also post there on request.

On faculty requests to fill, there is an additional series of field on the Requisition tab related to electronic reference letters. Should your department be interested in using electronic reference letters, you will need to complete these three fields, indicating the applicant instructions, the reference provider instructions, and the on-screen message the provider will see once his/her action is complete. In this process, the applicant will provide the e-mail addresses of a specified number of potential reference providers. These individuals will be automatically sent an e-mail with an embedded link which, when accessed, will allow that provider to upload/write a reference letter whose contents will not be visible to the applicant. Should you not be using this functionality, these fields can be disregarded.

The Instructions to Applicant field is a statement to the applicant displayed PRIOR to applying. The Instructions to Reference Provider field displays a message to the provider should there be any special requirements you are seeking within his/her letter. The Completed Message to Reference Provider is for any special thank you message, etc., that you might wish to display to the reference provider. A generic thank you message will appear automatically, so this field may be left blank if you wish.

Please note: in the upgrade to WorkforUM, applicants may now provide electronic reference letters even if the department is not requesting them. Departments may review or ignore such letters at their discretion. The three electronic reference letter fields generally contain pre-written text that you will need to customize before finalizing.

Supplemental Questions Tab

The **Supplemental Questions** tab is a section that will allow hiring officials to have a specific question or questions answered by applicants prior to being interviewed. This functionality will allow departments to view an applicant's answer(s) to pertinent questions to better screen for potential interviewees. If you wish to add a question to your posting, click the **Add a Question** link.

Previously-used questions may be selected from the box, or a new question may be written from scratch by clicking the **Add a New One** link.

Answers to posting specific questions may be multiple-choice (Predefined) or free-form (Open-Ended) text, must be directly related to the posting, and may not ask for information that could be used in an inappropriately discriminatory manner. Additionally, you may not ask question that goes above and beyond requirements of the job description; that is, if a position requires only a bachelor's degree, you may not use a question such as, "Do you have a master's degree?" unless you have specifically stated that you are interested in candidates with a master's degree.

If asking a question with predefined answers, you have the ability to score the responses to these questions. Once the question has been added, click on the text of the question again. You are encouraged to make the least favorable response to a given question have a score of zero (0), and increment the more favorable responses by one (1). This incremental scoring system is suggested so that questions throughout the WorkforUM question bank will have roughly the same scoring system throughout the University.

You also have the ability to make a given response automatically disqualify an applicant from consideration. However, you are only to use this functionality when the question is driving at a de facto job requirement. For example, a position requiring a valid driver's license might disqualify applicants who do not possess one. Please exercise great caution when using this feature, and know that your entries here will be vetted by Human Resources, Faculty Administrative Services, and/or Institutional Equity.

You can also make questions required and/or drag questions to list them in a particular order. After making your entries, if any, click **Next** to save and move to the next tab.

Applicant Documents Tab

On this tab, you may indicate which types of documents (resumes, cover letters, etc.) you wish to allow/require potential applicants to provide when applying to your posting. By clicking the checkbox in the **Included** column, the applicant is given the opportunity to upload that document. By ALSO clicking the checkbox in the **Required** column, the applicant **MUST** provide that document in order to make your pool of applicants. Please note that for a document to be required, BOTH checkboxes must be checked. This list of documents can be dragged and

re-ordered to your liking. After making your selections, if any, click **Next** to save and move to the next tab.

Training - Department & Training – HR Tabs

These tabs highlight training courses offered on campus that either the hiring department or Human Resources has indicated as being requirements for a given position.

Action Summary Tab

The final tab on any Request to Fill action is a summary screen which tracks all entries made on the other series of tabs. The system will perform error checking and indicate any problem areas with orange icons containing exclamation points. Successfully-completed sections will be noted with a blue check mark icon. If you have errors, you may click the **Edit** link by any section heading to make changes.

You have now completed your Request to Fill, and now it can be routed to the next appropriate level, returned to the previous level, saved for further revision at a later time, or cancelled. In the upper-right corner of the Action Summary tab, look for the Take Action on Action orange button. Roll your mouse over this button and make the appropriate selection. You are able to enter any comments you may have at this point. All parties within the action's workflow can leave comments that will be viewable by all other levels and included in e-mail notification messages. This comments section can be a helpful method of communication between offices and departments as the hiring process begins.

You may also choose to add this action to your Watch List by checking the corresponding checkbox. This will give you access on the front page of WorkforUM to track your action's progress as it is being handled by other user types in the workflow.

If you send this action to the next level in the workflow, the members of that level will receive an e-mail notification that they have an item in his/her **In Box** for their attention within WorkforUM.

Additional Training

This concludes the training session on Requests to Fill. Further WorkforUM training is available for the following topics.

- Introduction to the System
 - Requesting to Create a New Position
 - Requesting to Reclassify/Retitle an Existing Position
 - Tracking, Reviewing, and Processing Applicant Pools
 - Hiring an Applicant and Completing a Hiring Proposal
 - Changing a Position's Supervisor
 - Part-Time Faculty
-