MyTrack Position Description Guidelines

The guidelines below are intended to serve as a comprehensive resource for HR partners, hiring managers, and supervisors to cover all elements of the MyTrack PD and how to complete and submit a PD for review. The check boxes indicate key elements that HR recommends checking prior to submission.

Additional resources are located in the Position Description area of our User Guides and Tools: https://hr.uoregon.edu/recruitment/mytrack-recruitment-module/mytrack-user-guides-tools/mytrack-position-descriptions

These resources include:

Checklist only version of this document
PD user guide and field references (system documentation)
PD Action Table (guide to when you should edit or create a new PD)

Position Description

Reason

- ☐ Select the reason that represents the best option for editing or creating the PD
- ☐ Ensure selection aligns with the approval process that will be used in the “Users and Approvals” section at the bottom of the PD

Most common reasons:

New Position/Line – Select this option for a new position that is not currently filled by an employee. This also can be used in instances where you are backfilling a position with anticipated overlap or for interim direct appointments.

Departmental Initial Entry of PD – Select this option for established positions that are not yet in MyTrack, or have a “shell” PD in MyTrack. In these cases, there is likely an incumbent for the position. You will want to edit the existing “shell” PD attached to their Banner Position Number (B#). If there is no existing PD in MyTrack, you can use this reason for a first time PD entry and include the B# as a note on the PD.

Edit to previously approved PD – Select this option if you are making a change to a position description that has *already been approved through MyTrack*. Ensure the PD you are editing was *approved* through MyTrack. If not, select the “New Position/Line” reason or “Departmental Initial Entry” as appropriate.

Faculty Pool – To Launch an Open Pool – Used to launch faculty pools. These PDs can be more generic as they are intended to cover multiple purposes for the pool posting.

Faculty Pool Hire – Used to create the job specific PD to facilitate a hire from an existing pool. Job specific PDs are required for research pro tem pools. Instructional pro tem hires do not require job-specific PDs.

Reclassification (SEIU or UA) – Used to reclassify a member of SEIU or UA. This action is for an employee in a position. If you are intending to change the classification of a vacant position, please use another reason as appropriate.

Expansion of duties with pay increase – Used to expand the duties of an OA position with a pay increase. See OA Position and Pay Actions for further information. Update the employee's existing PD and include justification. If the existing PD in MyTrack does not contain full detail, attach a copy of the original PD to the documents tab.

Expansion of duties with no pay increase – Used to expand the duties of an OA position with no pay increase. See OA Position and Pay Actions for further information. Update the employee's existing PD and include justification. If the existing PD in MyTrack does not contain full detail, attach a copy of the original PD to the documents tab.

Is this PD update intended for immediate recruitment?

- ☐ Use the drop-down menu to select Yes or No.

Is this PD update intended for a direct appointment?

- ☐ Use the drop-down menu to select Yes or No.

Proposed Hiring Range

- ☐ Enter the proposed or requested hiring range

If the PD is being updated for a recruitment and there is an anticipated or desired hiring range for the position, please enter that here. This field does not take the place of the budgeted salary or the salary band for that position. If the PD is not being updated for recruitment, leave this blank.

Approved Hiring Range (HR Only)

For OA Position descriptions, HR Class/Comp will enter the approved Hiring Range here. This will not be entered for classified or faculty positions.

General Position Information

Items marked with an (*) will feed to the recruitment

Team

The Team field will auto-populate to the level 3 org, aka "Team" for the person initially creating PD. If you work with multiple level 3 orgs and need a Team changed, please email talent@uoregon.edu.

MyTrack Position Description Guidelines

Position Title

Enter the full position title here. This will be the advertised title if the PD is used for recruitment. This title will be shortened/abbreviated for entry into Banner if it is longer than the character limitation allows.

If there is currently a Banner title for the position, it will show in blue box under the Position Number field. If this is a new position, the banner title will be established when HR Operations sets up the Banner position number.

VP Area
School/College/Admin Unit
Division/Admin Sub Unit
Department or Program

Use these drop-down fields to enter your unit's org structure. The first two (VP Area and School/College/Admin Unit) are required; the last two are optional. HR recommends completing these consistently to aid you in future searches for PDs.

Timesheet Org

Enter your timesheet org here or may use the magnifying glass icon to open the search window. The eraser icon will clear all data in the field.

Appointment Type*

- ☐ Select the appropriate appointment type for your position. Note that some appointment types are specific to certain employee categories.

  - Regular: Most common option on PDs, intended for regular, ongoing positions
  - Funding Contingent (Faculty, Research, OAs): For positions that are funded entirely by external funds (Grants, awards, etc.)
  - Interim (OA): For term-limited OA positions as defined in the OA Position and Pay Actions. These positions will have a start and end date.
  - Intermittent (Classified): As defined in the SEIU CBA
  - Limited Duration (Classified): As defined in the SEIU CBA
  - Seasonal (Classified): As defined in the SEIU CBA
  - Academic Year (Classified)*: As defined in the SEIU CBA. Please also choose "9-month" for the annual basis.

*For Faculty or OA positions that are intended to be for the academic year, choose either "Regular" or "Funding Contingent" as appropriate and ensure the Annual basis selection is set to 9 months.

Duration*

Select either “Limited” or “Ongoing” as appropriate. Interim OA and Limited Duration Classified are the most common “Limited” options.

Rank

For faculty positions, choose the appropriate faculty rank. All OA and Classified positions should have “No Rank” selected.

For open rank positions, choose the lowest rank of the possible options for initial entry.

Annual Basis

Choose a 9- or 12-month basis as appropriate.

Expected FTE

- ☐ Enter the expected FTE for the position.

If the FTE is variable, indicate the expected FTE as a number in this field and leave a note detailing the variance (for example, if a position is starting at .8 FTE and increasing to 1.0 after 3 months, the expected FTE is 1.0, but it is important to document that it is starting lower and changing in a note on the notes tab).

Reports to (Position Number)

Enter the Banner position number (B#) of the supervisor for this position.
You may use Banner to look up that supervisor in PWIVERI to find the B#.

Primary Job Location*

Enter the primary job location for this position. This is where the position is based, not including expected travel. Options include every major city in the state of Oregon and every state in the US.

Position Budget

Budgeted Salary at 1.0 FTE

- ☐ Ensure budgeted salary is a specific number (not TBD, not a range)

Budgeted salary is intended to reflect *what your unit has budgeted for the position at 1.0 FTE* not including OPE. For example, if you have budgeted $30,000 to pay the salary for a position that is .5FTE, enter $60,000 for the budgeted salary at 1.0FTE.

This is not intended to replace the hiring range for the recruitment; it is used for position review and set up in Banner.

Position Funding

Please note how this position is funded.

- Regular Budget – Approved
- Regular Budget – Requested
- Sponsored – Secured
- Sponsored – Requested
- Gift Funds – Secured
- Gift Funds – Requested

Index
Account Code
Percentage
Explanation (if needed)

Please give the primary labor distribution for this position by listing index, account code, and percentage. For full FOAPAL elements or a split labor distribution, use the "Explanation" field to list additional items (such as another index, or a specific activity code).

Position Details

Items marked with an (*) will feed to the recruitment

☐ Upload org chart(s)

Organizational charts are required for all positions, and multiple formats are accepted. If an org chart is not supplied, even when one has not been required in the past, Talent Acquisition team members will reach out to ask for an updated org chart.

Ideally, org charts should show all employees reporting to the position, where that position reports up in the organization, and similarly situated or peer positions reporting to the same supervisor/level.

If you are updating a position and changing reporting lines, it is strongly recommended to upload "current" and "proposed" org charts to show the changes made.

To upload an org chart, click on the "Documents" tab at the top of the PD. In the drop-down field, select "Document from a file" to open the pop-up window. In this new window, select "Upload File" to browse your computer for the file location. Once the file is located and added, be sure the Document Category field says, "Org Chart" and title the org chart. You can either click "Save and close" or "Save and add another." When you are done, navigate back to the main tab of the PD by clicking "Position Info"

Department Summary*

- ☐ Includes a description of the department/unit as a whole and explains the department's role within campus.

The department summary transfers on to the job requisition and ultimately your position announcement if you are recruiting for this position.

HR recommends including the following items in your department summary as applicable. One department summary can be drafted for your department and used on all position descriptions.

1. Program name
2. Program purpose
3. Who is affected (student, faculty, staff, external audience)
4. Size of department
5. Scope/relationship to UO/department mission or connection to division/school

The Department Summary is <u>not</u> intended to be specific to each position, but instead recommended to be consistent across all positions or like positions department wide.

Position Summary*

- ☐ Position summary is a comprehensive narrative of the position's role within the department that clearly describes the purpose of the position and the essential functions that will be completed.

It is important to have a comprehensive position summary clearly explaining the position. The "Job Duties" do not transfer to the final posting announcement, so this summary is the candidate-facing explanation of the position.

The intent is not to list all duties verbatim, but instead to capture the essence of the job in a narrative fashion.

HR recommends that you consider the following information for the position summary.

1. Purpose of position
    a. "The purpose of this position is…."

2. Essential functions of position
    a. Overview or summary of essential responsibilities
    b. Not intended to be a cut/paste of full duties

3. Interactions/Work Contacts (if applicable/essential)
    a. Who does this position regularly come in contact with outside of coworkers?
    b. Scope of contacts: internal, external, local, national, international

4. Job-related decision making

   a. Types of decisions made (personnel, financial, day-to-day operations, strategic, etc.)
   b. Budget Authority (if applicable)
   c. Impact of decisions (department, division, campus, etc.)
   d. Level of independence in decision-making
   e. Guidelines/policies used

5. Supervision
   a. Who does this position report to?
   b. Who reports to this position?

This section may also contain a work schedule, driver's license requirement, working environment and hazards, physical or other demands, or other information pertinent to potential candidates.

Minimum Qualifications*

In general, Minimum Qualifications (MQs):

- Include the minimum degree or amount of experience and the minimum level of skills, abilities, licensures, certifications, and other job-related requirements that must be met for a candidate to be qualified for the position.
- Are binary, meaning a candidate either meets the requirement or not, based on an objective review. The University cannot hire a candidate who does not meet all the minimum qualifications – there are no exceptions.
  - This also means MQs should not include ranges, but instead the lowest acceptable level experience.

    Example: Instead of *3-5 years' experience in (specialty field)*, the MQ would be *3 years' experience in (specialty field)*

For requirements at the University's discretion (for example, those not specified in class specifications or to meet classification/rank requirements), consider using equivalent criteria. For example, "Bachelor's degree and two years of related professional experience, or an equivalent combination of education and experience."

Requirements for MQs depend on the position type:

<u>Officer of Administration (OA)</u>

- ☐ MQs correlate with the essential functions of the position
- ☐ MQs are measurable
- ☐ MQs are directly job-related and practical (i.e., obtainable in the general labor market)
- ☐ MQs promote a successful search and are not so restrictive that they exclude candidates who might reasonably have the ability to do the job

<u>Classified</u>

- ☐ MQs are taken *directly* from the Classification Specifications (see http://jobs.usse.oregonstate.edu/) for the classification of the position. If minimum qualifications are not established for this classification, please consult Talent.
- ☐ Any special qualifications are listed within this section under the heading of "Special Qualifications."
- ☐ Any special qualifications are specifically job-related *and* justifiable.

Special Qualifications are items that are required to perform the duties of the position and may include items such as licenses, certifications, etc. Special qualifications are subject to HR approval. Special qualifications may be moved to the Position Summary area during the review.

Faculty

- ☐ MQs align with the academic classification and rank (Section 15 of the United Academics CBA. See https://hr.uoregon.edu/employee-and-labor-relations/uo-bargaining-units-cbas/united-academics)
- ☐ MQs are measurable

If the PD is intended for launching a pro tem pool or an open-rank search where the hires may include multiple classifications and ranks, MQ options should be listed for *each* of the possible position classifications and ranks.

Professional Competencies*

- ☐ Ensure PCs represent the knowledge, skills, and abilities (KSAs) needed *at the point of hire* for a candidate to be successful.

Professional competencies are the KSAs or "soft" skills (i.e., characteristics, values, and work ethics) needed in a successful candidate at the point of hire. Professional competencies are often transferable skills or traits. These should be obtainable and not present artificial barriers to employment. These are also often not measurable (e.g., "ability to")

If *specific* KSAs can be obtained on the job via training, they should not be included (for example, familiarity with Banner, knowledge of UO Policies, etc.).

Preferred Qualifications*

- ☐ Ensure PQs are measurable.
- ☐ PQs represent job-related levels of experience, education and/or skills that the *ideal* candidate would have; these are beneficial but are not required for success.
- ☐ PQs are relative to the position.

Preferred qualifications are the *additional* measurable and job-related levels of experience, education, and/or specific skills that the *ideal* employee would have. These are not required, but thoughtful preferred qualifications can be very helpful in narrowing down a competitive applicant pool.

Supervision

Full supervision includes hiring, training, and developing, administering corrective action, addressing grievances, reviewing performance, and completing annual evaluations, scheduling, defining expectations, and termination via appropriate processes.
Lead work/Oversight is defined as less than full supervision and includes organizing, setting priorities, communicating appropriate work standards, scheduling, and reviewing work, and providing feedback to managers on employee performance.

- ❑ Select the highest level of supervisory responsibilities that the position has.
  - Example: If a position supervises and also provides oversight, you will select the appropriate level that begins with the word "Supervises."
- ❑ Enter FTE that the position is responsible for in each employee category.
  - Example: If the position supervises 3.0 FTE of OA and provides oversight for an additional 2.0 FTE of classified employees, you will mark FTE in *both* areas.
- ❑ Ensure supervisory relationships are also clear in the position summary AND job duties.

Supervisory Responsibilities

MyTrack Option	Definition
None	Not responsible for supervising others *or* providing lead work/oversight to others.
Lead Work/Oversight	Less than full supervision; includes organizing, setting priorities, communicating appropriate work standards, scheduling, and reviewing work, and providing feedback to managers on employee performance.
Supervises non-supervisors, shared decisions	Full Supervision of other non-supervisory employees. May share some actions with higher level management.
Supervises primarily non-supervisors, full decisions	Full Supervision of mainly other non-supervisory employees. Responsible for all employment actions for direct reports.
Supervises primarily other supervisors	Full Supervision of mainly other supervisors. Has responsibility for all employment actions for direct reports and oversight for indirect reports.

Decision Making and Fiscal Responsibility

- ☐ Complete required drop-down fields regarding decision making and fiscal responsibility (required for all employee categories)
- ☐ If a position has fiscal responsibility, complete the Operating Budget field with the total (rounded) amount of funds for which the position is responsible. Depending on the position, this could include General, Auxiliary, Grant, Foundation, and/or Agency funds
  - The Grant, Foundation, and Agency Funding fields are optional to complete.

Principles for making selections in the Decision Making and Fiscal Responsibility areas:

- Selections are about the position, not the person occupying the role.
- Selections should reflect the *highest level* of work *regularly performed* by a *fully trained* employee. For budget numbers, indicate the maximum amount the position will regularly influence, as described in the Fiscal Authority and Fiscal Responsibility areas.
- Choose the option that best describes how the position exists, not how someone would be trained nor an aspirational view of what the position could be in the future.

Scope of Decisions Made (i.e., how does this position make decisions)

MyTrack Option	Definition
Directed	Follows written and verbal instructions or procedures. Implements decisions made by others.
Guideline Driven	Follows established guidelines. May participate in the establishment of guidelines or procedures for their immediate work team/group.
Policy Driven	Interprets policies and/or participates in the establishment of guidelines or procedures for their unit/department.
Authority – Unit	Acts as an authority to implement policy and/or establishes procedures or guidelines for their unit/department.
Authority – School/ College/Division	Acts as an authority to implement policy and/or establishes procedures or guidelines for their school/college or VP area/Division.
Authority – University	Acts as an authority to implement policy and/or establishes procedures or guidelines for the University.

Impact of Decisions Made (i.e., what is the sphere of influence of those decisions)

MyTrack Option	Definition
Position	Decisions impact one's own work. Erroneous decisions may have an impact on the immediate work team.
Unit/Department	Decisions have implications within a unit or department. Erroneous decisions may impact cost, customer service, goal achievement, reputation, etc.
School/College/Division	Decisions have implications for the school/college or VP area/Division. Erroneous decisions may impact cost, customer service, goal achievement,
School/College/Division + University	Decisions have major implications to other areas of the University in addition to their own school/college or VP Area/division. Erroneous decisions may impact cost, customer service, goal achievement, reputation, etc.
University	Decisions have significant, broad implications for the entire University; contributes to overall strategy and direction for the University. Erroneous decisions may have significant financial, reputational, or community impact.

Autonomy and Discretion (i.e., how directed, or independent is the work)

MyTrack Option	Definition
Little Discretion	Work is routinely monitored by supervisor; follows established and/or detailed guidelines, processes, and procedures. Little discretion in work.
Some Discretion	Work progress is monitored by supervisor; follows established guidelines, procedures, or policies; follows precedents. Some discretion in work.
Independent Work, Results Defined	Results are defined; existing practices are used as guidelines and discretion is used to determine specific work actions; carries out work activities independently; supervisor provides guidance and is available to resolve problems.
Independent Work, Overall Direction	Results are generally defined; sets own goals and independently determines how to accomplish tasks; precedents may exist to follow; supervisor provides broad guidance and overall direction.
Broad Latitude	Provides input and/or recommendations on the results to be achieved; has broad latitude to set own goals and determine how to accomplish results with few or no guidelines to follow; acts in accordance with leadership vision.

MyTrack Position Description Guidelines

Fiscal Authority (i.e., what is the sphere of influence for fiscal decisions)

MyTrack Option	Definition
None	Has no fiscal authority.
Limited	Has limited fiscal authority based on set parameters, requests approval for financial actions beyond defined scope.
Unit/Department	Responsible for financial decisions within academic or administrative unit/department or for a subset of that unit/department. May provide input to the budgeting process.
School/College/Division	Responsible for financial decisions that impact the School/College or VP Area/Division. May participate in the overall budgeting process.
University Level	Makes or contributes to financial decisions which broadly impact all or significant parts of the university. Responsible for fiscal controls.

Fiscal Responsibilities (i.e., what are the responsibilities within that sphere of influence)

MyTrack Option	Definition
None	Does not perform tasks related to budget.
Transactions	Responsible for transactional spending and may approve or monitor transactions completed by others. Not responsible for decision-making regarding transactions.
Administration/Oversight	Responsible for the administration/oversight of budgets. May also process transactions but has decision making authority regarding spending as defined by unit.
Budget Authority	Responsible for decisions regarding budget and expenditures.

Job Duties

- ☐ Job Duties are complete and add up to 100%.
- ☐ Each duty is marked as essential or incidental.

- ☐ Any supervisory duties are included as a distinct percentage of time.

Provide a breakdown of responsibilities into the major functional areas for the position, with percentages of time for each function. Essential functions inform your minimum qualifications and describe the major responsibilities of the position. Typically, there are 4-6 major functions, with more detailed information included in the function description.

Tips on developing job duties:

- For each major function, estimate the percentage of time for that function over the course of the year
- Consider the format of (action) (subject) (to what end)
    - Example: "File paperwork" vs "File employee personnel records to ensure compliance with employment policies and CBAs"
- Include appropriate disclaimers such as "Other duties as assigned"
- Group similar essential functions together under a main functional area and include the details as bullets below
- DO NOT list every possible task that a person in the role would do
- DO NOT include information that will change each performance period

Job duties do not appear in the position announcement. You can use greater detail in the Job Duties area to ensure you are clearly outlining the essential functions of the position.

Factors to consider in determining whether or not a function is essential:

- Does the job exist to perform this function?
- How much time is spent performing this function?
- What are the physical and mental elements of this function?
- Can other co-workers do this function if necessary?
- Would taking the function from the job significantly change the job?
- Would there be significant consequences if the function were not performed

Incidental functions are still important to the position; however, these could be redesigned or reassigned to other employees, if necessary.

Working Conditions

- ☐ Note anticipated, typical work functions that are required for the position (e.g., Keyboarding/Computer Use)
- ☐ Note typical working environment and hazards (e.g., Normal Office Environment)
- ☐ Note any lifting demands, clarifying additional physical demands or unusual working conditions in the large text field as needed
- ☐ If work schedule is not typical or is specific and required, please explain in the large text field (e.g., graveyard shift, or required hours for staffing reception areas)

Human Resources

This section is not editable outside of University Human Resources.

It includes information about:

- Position coding
- Designated reporting (see https://investigations.uoregon.edu/designated-reporter)
- Salary range
- Bargaining unit
- FLSA status
- Additional position specific pre-employment checks required

HR recommends reviewing this section after the PD has been approved.

Users and Approvals

There are three core user roles on every PD: HR Administrator (unit), Hiring Manager, and Unit Director/Head. Any user listed in one of these roles will receive an email once the PD has been approved.

There are also various approver roles on a PD based on which approval process is chosen. Each approver will receive an email when they are asked to approve a PD but will not receive an email once the PD is fully approved.

- ☐ Ensure approval process chosen aligns with reason listed at the top of PD
    - Do not use "CENTRAL HR USE ONLY" approval processes
- ☐ Enter approvers as defined within your unit.

Items to note:

- MyTrack will "remember" the last approvers you used in an approval process. This does not indicate that you must use those approvers again. Unit level approvers are decided by unit leadership, so these may be edited as needed. University HR user roles will prepopulate in most approval processes; do not overwrite HR user roles.

- Some positions require an approval process noting "Special Review." Currently all IT or Communications positions require special review.

- Incorrect approval processes require restarting and can impact review timelines. If you are unsure which approval process to use, please contact our team at talent@uoregon.edu.

Notes Tab

Notes are a helpful way to alert unit approvers or University HR of important information regarding your PD submission.

Examples of common notes:

- "This PD is a copy of PD-XXXX, which was previously approved, and is being submitted to add an opening to an existing search"
- "This PD is a copy of PD-XXXX with minor updates to (list areas)."
- "This PD is to complete a hire out of a pro-tem pool."
- "This PD is being submitted to complete an interim direct appointment to this position."

Do not add notes that contain confidential information. All notes are visible to all users within your team as well as the employee(s) in the position.