Summary of Revisions and Guides to

Position Description Workflow

Beginning June 15, 2023, HR will no longer be accepting paper Hiring Freeze Request Forms (HFE) for position approvals. All approvals will be processed within PeopleAdmin. When your positions are created/modified, you will submit the supporting documentation previously submitted with the freeze form (org chart, search waiver, etc.) into PeopleAdmin.

Before You Begin:

Staff, Faculty Coach, and Faculty Equivalent Positions

- If a department is requesting a **new position**:
    - the New Position Review Form must be completed and reviewed before entering anything in PeopleAdmin.
    - HR will let you know when to proceed in PeopleAdmin.
- If a department wants an existing position **reviewed for a reclassification, department restructure,** or position has had **significant changes:**
  the Job Description Form must be completed and reviewed before entering anything into PeopleAdmin.
    - HR will let you know when to proceed in PeopleAdmin.
    - If there is an existing employee in a position for review, the review can take up to ***45 working days***.

- If there is **no significant change** to a position, the department can proceed with the position in PeopleAdmin and does not need to wait on approval from HR.

Faculty Positions (Academic Affairs)

- If a department is requesting a **new position,** please contact Mary Chapman, chapmanm@marshall.edu to obtain a position number. Once you have a position number, you will then proceed to PeopleAdmin to create the position.
- If it is an existing position, the department can proceed with the position in PeopleAdmin and does not need to wait for approval from HR.

Step-by-Step Guides

Staff

- Non-Classified/Classified Exempt and Classified Non-Exempt
  - New Positions
  - Modify Positions
  - Staff Workflow

Faculty

- Faculty (Academic Affairs)
  - New/Modify Positions
- Faculty Coaches (Athletics)
  - New/Modify Positions

Workflows

- Faculty
- Staff

STAFF POSITIONS

Non-Classified/Classified Exempt and Classified Non-Exempt – New Positions

STEPS:

1. **Dean/Director or VP Role will start the position workflow.** You will need to enter the information needed for the position. [Instructions](#)
   - If your position is a search waiver, there is a section ("Reason for Modification") at the beginning of the position in PeopleAdmin. You will select "Request Search Waiver". You will then list your justification of need for the waiver. You will also attach the "Search Waiver Memo" as a position document.
   - The Dean/Director role will then submit the description and move on to the VP.
2. **The VP Role will then review the position information** (If you started the PD at the VP level, there is no need to review. You will move on to the approval part)**.** Once the information has been reviewed by the VP, the VP will either approve and move to the SHC or return to Dean/Director if corrections or additional information is needed.
3. **The Strategic Hiring Committee will then review the position.** This will be conducted and approved at their monthly meeting.
   - **If approved**, the position will move to Budget.
   - If **not approved**, you will receive a notification from HR and your position will be moved back to the Dean/Director queue.
4. **Budget will review the budget information.** This will be the (Fund/Org/Percentage) provided by Dean/Director.
   - If the Budget office has any questions, they will contact the dept.
   - Once they approve, they will then submit it to HR for a final review.
5. **HR will give the position one final look.** If all is correct, the position will be approved.
   - You will then receive an email that the position has been approved and you can proceed with the job posting in the Applicant Tracking Module (**Blue Screen**)

Non-Classified/Classified Exempt and Classified Non-Exempt – Modify Positions

STEPS:

1. **Dean/Director or VP Role will start the position workflow.** You will need to enter the information needed for the position. Instructions
   - If your position is a search waiver, there is a section ("Reason for Modification") at the beginning of the position in PeopleAdmin. You will select "Request Search Waiver". You will then list your justification of need for the waiver. You will also attach the "Search Waiver Memo" as a position document.
   - The Dean/Director role will then submit the description and move on to the VP.

2. **The VP Role will then review the position information.** (If you started the PD at the VP level, there is no need to review. You will move on to the approval part). Once the information has been reviewed by the VP, they will now need to determine if the position needs to go to the SHC.
   - If the position has been **changed from the previous position**, the VP will send the position description to the SHC.
     - **The Strategic Hiring Committee will then review the position.** This will be conducted and approved at their monthly meeting.
     - **If approved**, the position will move to Budget.
     - If **not approved**, you will receive a notification from HR and your position will be moved back to the Dean/Director queue.
   - If you are simply **filling the position with a new incumbent and no changes** have been made, the VP will send the position description to Budget. The VP can also return to Dean/Director if corrections or additional information is needed.

3. **Budget will now review the budget information.** This will be the (Fund/Org/Percentage) provided by Dean/Director.
   - If the Budget office has any questions, they will contact the dept.
   - Once they approve, they will then submit it to HR for a final review.

4. **HR will then conduct their review.**
   - If there are no changes to the position description, HR will approve the position.
   - If there are any changes needed to the position (salary, etc.), HR will make the changes and send back to Budget for approval.
   - Once all is correct, the position will be approved, and you will then receive an email that the position has been approved and you can proceed with the job posting.

FACULTY POSITIONS

Faculty Positions (Academic Affairs) – New/Modify Positions

STEPS:

1. **Dean/Director or VP Role will start the position workflow.** You will need to enter the information needed for the position. New Instructions, Modify Instructions
   - If your position is a search waiver, there is a section ("Reason for Modification") at the beginning of the position in PeopleAdmin. You will select "Request Search Waiver". You will then list your justification of need for the waiver. You will also attach the "Search Waiver Memo" as a position document.
   - The Dean/Director role will then submit the description and move on to the VP.
2. **The VP Role will then review the position information.** (If you started the PD at the VP level, there is no need to review. You will move on to the approval part)**.** Once the information has been reviewed by the VP through their IBM model (AA positions), the VP will decide
   - If the position passes the IBM model, the VP will approve the position and move it to Budget.
   - The VP can also return to Dean/Director if corrections or additional information is needed.
3. **Budget will review the budget information.** This will be the (Fund/Org/Percentage) provided by Dean/Director.
   - If the Budget office has any questions, they will contact the dept.
   - Once they approve, they will then submit it to HR for a final review.
4. **HR will give the position one final look.** If all is correct, the position will be approved. You will then receive an email that the position has been approved and you can proceed with the job posting in the Applicant Tracking Module (**Blue Screen**)

Faculty Coach Positions (Athletics) – New/Modify Positions

STEPS:

1. **Dean/Director or VP Role will start the position workflow.** You will need to enter the information needed for the position. New Instructions, Modify Instructions
   - If your position is a search waiver, there is a section ("Reason for Modification") at the beginning of the position in PeopleAdmin. You will select "Request Search Waiver". You will then list your justification of need for the waiver. You will also attach the "Search Waiver Memo" as a position document.
   - The Dean/Director role will then submit the description and move on to the VP.

5. **If started at Dean/Director Role, the VP will then review the position information.** (If you started the PD at the VP level, there is no need to review. You will move on to the approval part).**Once the information has been reviewed by the VP, they will now need to determine if the position needs to go to the SHC.
   - If the position has been **changed from the previous position**, the VP will send the position description to the SHC.
     - **The Strategic Hiring Committee will then review the position.** This will be conducted and approved at their monthly meeting.
     - **If approved**, the position will move to Budget.
     - If **not approved**, you will receive a notification from HR and your position will be moved back to the Dean/Director queue.
   - If you are simply **filling the position with a new incumbent and no changes** have been made, the VP will send the position description to Budget. The VP can also return to Dean/Director if corrections or additional information is needed.

2. **Budget will now review the budget information.** This will be the budget information (Fund/Org/Percentage) provided by Dean/Director.
   - If the Budget office has any questions, they will contact the dept.
   - Once they approve, they will then submit it to HR for a final review.

3. **HR will give the position one final look.** If all is correct, the position will be approved. You will then receive an email that the position has been approved and you can proceed with the job posting in the Applicant Tracking Module (**Blue Screen**)
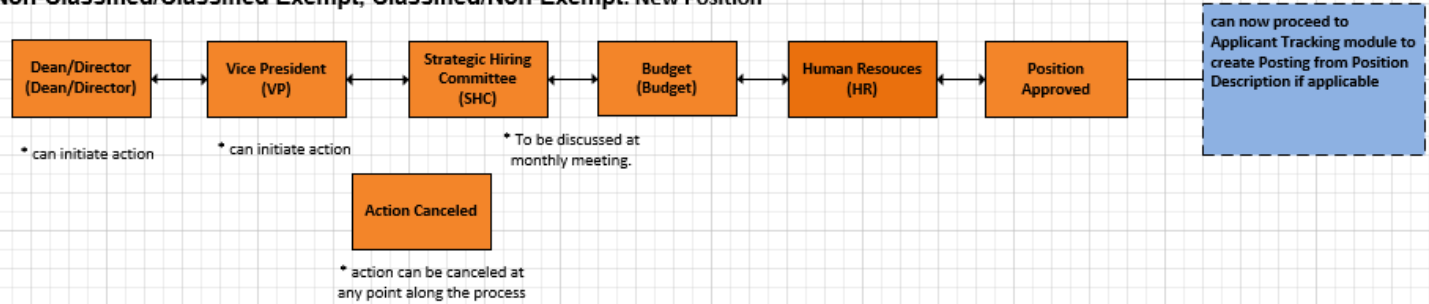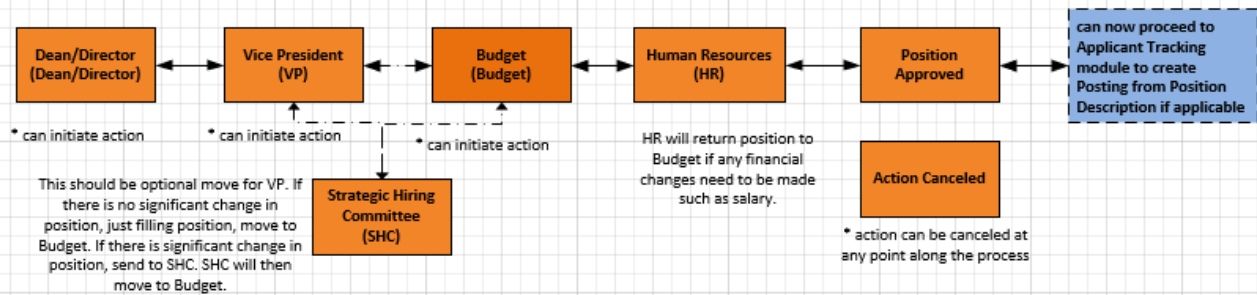
Staff Workflows

Non-Classified/Classified Exempt, Classified/Non-Exempt: New Position

Dean/Director (Dean/Director) → Vice President (VP) → Strategic Hiring Committee (SHC) → Budget (Budget) → Human Resouces (HR) → Position Approved

can now proceed to Applicant Tracking module to create Posting from Position Description if applicable

* can initiate action

* can initiate action

* To be discussed at monthly meeting.

Action Canceled

* action can be canceled at any point along the process

Non-Classified/Classified Exempt, Classified/Non-Exempt: Modify Position

Dean/Director (Dean/Director) → Vice President (VP) → Budget (Budget) → Human Resources (HR) → Position Approved

can now proceed to Applicant Tracking module to create Posting from Position Description if applicable

* can initiate action

* can initiate action

* can initiate action

This should be optional move for VP. If there is no significant change in position, just filling position, move to Budget. If there is significant change in position, send to SHC. SHC will then move to Budget.

Strategic Hiring Committee (SHC)

HR will return position to Budget if any financial changes need to be made such as salary.

Action Canceled

* action can be canceled at any point along the process

Faculty Workflow

Faculty: New/Modify Position

AA Faculty RCM Approve Return to Dean/Director Cancel

Dean/Director (Dean/Director) → Vice President (VP) → Budget (Budget) → Human Resouces (HR) → Position Approved

can now proceed to Applicant Tracking module to create Posting from Position Description if applicable

* can initiate action

* can initiate action

* FC Positions Only If significant change in position, send to SHC. If no significant change, send to Budget.

Strategic Hiring Committee (SHC)

Action Canceled

* action can be canceled at any point along the process