# ADMINISTRATIVE & STAFF POSITION GUIDELINES

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## INTRODUCTION

Panthersoft HR is the system used for the maintenance of position-related data. The system consolidates the management of positions, creation of new positions, position profiles, job codes, talent acquisition management and the candidate gateway.

As a result of the Panthersoft HR implementation, the business process for position maintenance includes:

- The Electronic Position Request Form (ePRF) used to request all position-related transactions.
- Three-level approval process for all transactions.
- Creation of Business Units to facilitate reporting.
- A systematic assignment of position numbers.
- The Financial Organizational Departments and HR organizational departments are consolidated and maintained by the Compensation Department. The form used to request or make changes to an Organizational Department ID can be found at:
  http://finance.fiu.edu/controller/downloads/Org_ID_Maint_Form.pdf

Florida International University requires that an accurate and up-to-date position description be maintained for all Administrative and Staff positions. The Position Description Report serves to document the assigned essential and marginal duties, hours of work, and other requirements specific to the particular job. It serves as basis in setting standards for an employee's performance and documents reporting relationships for Administrative and Staff positions. Each job code has corresponding minimum education, training and experience requirements associated with it. Any additional departmental job preference and pre-employment requirements are also included in the non-person profile.

## PROFILE MANAGEMENT

**Profile Management** is the framework for developing and managing profiles. Profiles are used to describe the attributes of jobs or individuals in a structured format.

**Profile Types** define the structure and content of profiles and include non-person for positions and person for employee attributes.

The Non-person Profile describes the attributes of the position including Knowledge, Skills, and Abilities (KSAs), Qualifications, Working Conditions, Departmental Preference, Schedule, Compliance Requirements, and Duties. Non-Person Profiles are tracked by position number.

There are also Person Profiles associated with the employee. It will include the employee's degrees, licenses, KSAs and language skills. Person Profiles are linked to the employee's ID.

In Panthersoft HR, some of the position attributes must be selected from a pre-defined catalog, referred to as the Content Catalog.

**CONTENT CATALOG**

The Content Catalog is a repository of data that can be associated with a Person or Non-Person Profiles. Position attributes are part of a Content Catalog. Content Types within the Catalog broadly define a group of items such as degrees, KSAs, Working Conditions, Compliance, Pre-employment Requirements, Machines and Equipment, Schedules, Licenses, and Other Essential job requirements. Each content type has content items that users associate to a particular position.

The Content Type of "KSAs" refers to the knowledge, skills, and abilities needed to perform the essential duties of a position. They are maintained in the content catalog. There are four content items within the KSA content type as follows:

1. Knowledge
2. Mental Ability
3. Physical Ability
4. Skill

The Content Type "Machines and Equipment" refers to those machines and equipment that the position's incumbent will be required to use. There are 10 content items in this category as follows:

1. Aquatic
2. Automotive
3. Custodial
4. Grounds
5. Lab
6. Maintenance
7. Medical
8. Media/Technology
9. Office
10. Police

There are two content items within the Content Type of "Other Job Essential Factors" including environmental requirements and special scheduling requirements.

The "Working Conditions" Content Type includes working conditions that will require the employee to attend special training provided by the Environmental Health and Safety Department upon hire.

The Content Type "License and Certification" refers to licensures or certifications the incumbent will be required to possess or obtain. There are five(5) license and certification content items, including:

1. Administrative
2. Professional
3. Skilled Craft
4. Technical Paraprofessional
5. Service Maintenance

The "Compliance" content type includes two content items: NCAA Compliance and Financial Disclosure. They are selected if applicable to the position.

The "Working Hours" are also part of the content catalog.  This defines the schedule.

If a department needs a specific  item that is not found in the Content  Catalog, the user would request to add an item to the catalog by following this process:
1. Save the transaction but do not submit.
2. Submit a request to Compensation to add the new item.
3. Once added, user may continue to complete the pending transaction.

## ELECTRONIC POSITION REQUEST FORM (ePRF)

**Electronic Position Request Form (ePRF)** is the on-line front-end request used by departments to initiate position actions, including requests for new positions and requests for updates to existing positions.  This front end application has multiple functionalities including:

- Integrating the process of requesting new administrative/staff positions and creating the corresponding position description.
- Requesting and creating new Faculty positions.
- Replacing the Proposal for Faculty Recruitment (PAR) form.
- Integrating workflow approval
- Creating and/or updating the position table, the job table (updates incumbent), non-person profile, and budget table.

The ePRF form is initiated by the requesting department.  This electronic request is routed to the Department Head, the Business Unit Head and to Compensation or Academic Affairs depending upon whether the request is for faculty or staff approval.  Approvers will have the option of approving, pushing back or denying the request.  Each approver also has the option of adding an AD HOC approver, if needed.  AD HOC approvers may include the University President, the CFO, DOR, and others.

**ePRF LOCATION**

The ePRF is located in the following link:

**Main Menu, Manager Self Service, ePRF Request Form, Enter/Update Position Request**

When submitting a request for a **new** position, Originators should select the Job Code number to populate the Job Information.

When submitting a request for an **update** to an existing position:
- Select the position number of interest.  The system will automatically default  the following current information:  Job Information, Organizational Information, Other Information, Budget Information, and Non-Person Profile

**FLAG FUNCTIONALITY**

There are three flags that can be selected to denote different transactions. They are:

- **Post Upon Approval**- This flag triggers a notification to Recruitment upon position action approval. The "Requested Effective Date" should be the effective date when the position is created or updated.



- **Pay Action**- This flag triggers a notification to Employee Records to implement the pay action upon position action approval.



- **Budget Purposes Only**- This flag identifies requests for new position numbers to be used in the position budget tool during the budget process. This transaction does not require a position description and will not be a valid position for Recruitment purposes. Once the Business Unit approves the action, the position number will be generated.

**ePRF Actions**

ePRF can be accessed through Manager Self Service.  The system allows the user to do the following:
- Search for pending or historical transactions
- Order search results by clicking on the available attributes
- Initiate new transactions
1. <u>New position request</u> – occurs to establish a position that has never existed in the university. The Compensation Department will work with the requesting department to ensure that the position is properly classified. The position number will be systematically assigned upon position approval. To initiate a new transaction the user must click on add (the Request ID is generated automatically) The Non-person profile number and the position number are the same.
2. <u>Updates -</u> Any action taken to change any of the attributes of a position, including but not limited to, job codes, work schedule, FLSA designation, shift, working title, reports to, etc.

**ePRF Approval Process**

The ePRF is submitted for a three level approval process.  The approvers are:
1. Department Manager
2. Business Unit Head
3. Compensation for Admin/Staff Positions
   Academic Affairs for Faculty Positions

**AD HOC Approvers**

Users have the ability to add additional Ad Hoc Approvers and/or reviewers at any time throughout the workflow process.  Some examples of the Ad Hoc approvers are Budget Manager, DOR, or the President.

# POSITION ACTION/ REASON TABLE

All position related transactions can be divided into two types:

1. Create NEW – to establish a position that has never existed in the HR system. The position number will be systematically assigned upon position approval.
2. Update – Transactions used to change any of attributes of an existing position.

Following are the Reasons used to effect any action through ePRF:

## ACTION REASON CODES

| Reason | Description | Definition |
| --- | --- | --- |
| ADY | Added Duties | Added duties that may or may not result in a salary increase. |
| CDE | Pay Plan Change Demotion | Change in job classification to a lower level in a different pay plan. |
| CIS | Change in supervisor | Change in the reports to. |
| CPP | Pay Plan Change | Change in pay plan that results in a lateral move or a movement to/from Faculty. |
| CPR | Pay Plan Change Promotion | Change to a higher level job classification in a different Pay plan (i.e. Staff to Admin) |
| DUT | Change in Duties | Change in duties that do not result in a salary increase or a change in title. |
| FTI | FTE increase | Increase in standard hours of work. |
| FTR | FTE Reduction | Decrease in standard hours of work. |
| GRA | Pay Grade Change | Change in pay grade that may or may not result in a pay Increase. |
| LWC | Leadworker Change | Change in leadworker designation |
| NEW | New position | A position that has not been established in the system. |
| RCD | Reclassification - Demotion | Change in job classification to another one with lower level of responsibility and lower pay grade maximum in the same pay plan. |
| RCP | Reclassification - Promotion | Change in job classification to another classification with a higher level of responsibility and a higher pay grade maximum in the same pay plan. |

| REC | Reclassification – Lateral | Change from one job classification to another one with the same level of responsibility and the same pay grade maximum in the same pay plan. |
|-----|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| REO | Re-organization | Change in organizational department ID. |
| RFR | Request for Recruitment | Submits a job opening request to a Recruiter with no changes to the existing position. |
| SHF | Change in Shift | Change in shift due to a change in the work schedule. |
| TTL | Change in Working Title | Change in working title only. |
| UPD | Profile Update | Changes in profile attributes that do not affect the job. |

**POSITION DESCRIPTION REPORT**

Users may print or view a position description report for a specific position number. The position description report will be generated with data from the Job Code Table, the Position Table, and the Non-Person Profile. This report will include position attributes, organizational structure, position requirements, qualifications, and duties.

The Position Description Report can be viewed and printed by following this path:

*Main Menu>Organizational Development>Position Management>FIU Position Description*

**Salary Actions**

Any salary increases or decrease resulting from a position related transaction will be processed through the ePRF process.  After all the approvals are granted, an e-mail will be routed to Employee Records for processing.  The increase will take place on the effective date noted on the ePRF.

Salary actions not associated to the position will continue to be processed by completing the Admin/Staff Change in Status Form.

**Additional Compensation**

Employees may be approved for secondary employment which constitutes dual employment provided such employment does not interfere with the regular work of the employee, does not result in any conflict of interest between the two activities, and is determined as being in the best interest of the University.

Any work to be paid as additional compensation must be in accordance with the [Dual Employment and Compensation policy.](#)

Departments should complete the Additional Compensation Request form which may be found in PS Self Service.  **All Additional Compensation Requests for Administrative and Staff personnel must be approved by Human Resources prior to the work being performed**.

Payment requests for additional compensation should be submitted through Contracts in PS HR.

## On-Line Tutorials for ePRF Transactions

The User Productivity Kit (UPK) is an on-demand learning tool, which provides learning activities to assist users in becoming familiar with the Panthersoft Human Resources application.

Before getting started please make sure to:

1. Use Internet Explorer 5.5 or higher, Firefox 2.0 or higher, or Safari for the Mac.
2. Turn off all pop-up blockers. This includes Windows' built-in pop-up blocker and others such as the one used in the Google Toolbar.
3. Refer to the UPK Instructional Guide for information on using the player.

The link to access the UPK is:

**http://panthersoft.fiu.edu/hr/UPK/Publishing%20Content/PlayerPackage/toc0. html**

Select the ePRF transactions.