Hiring Phase II – PD Completer Role

Training Documentation

PD COMPLETER Role Overview: Update access for PreHire (Regular and Temp Positions) and Waiver processes. The PD Completer will have view only access to Position Summary and Waiver pages. PD Completer will have update access for Position Requirements and Position Description.

PreHire Approval Process (Create New)

The Prehire Approval Process is the approval process for recruiting for a vacant position. The request can be for a brand new position or for a refill. It includes FTE Positions only. You will never receive Temporary Positions. As a PD Completer, you will have view only access for the Position Summary, which includes the basic position information, and update access for the Position Requirements and Descriptions. Your role is to complete the Position Requirements and Descriptions only.

Step 1: Navigation

When you have a transaction pending you, there are 3 ways to navigate to it.

Navigation Option 1: E-Mail

As soon as the Funding Approver approves the funding for the position, you will receive an e-mail from CUBS notifying you of the pending transaction. The e-mail will contain minimal information about the request as well as a link to the transaction.

Direct link to the Transaction.
Navigation Option 2: Worklist

You can also access transactions pending your approval from your PeopleSoft worklist:

![Worklist Navigation](image)

Navigation Option 3: Search

Finally, if you know what the transaction number is, you can search on the application itself. You can access the application by going to **Workforce Administration**, choosing **CU Reports/Processes**, and the application is labeled **Recruit/Hire**. This will bring up the search view where you can search by a variety of values. If you leave all values blank and click “Search”, it will bring up all transactions you have security to see – not just transactions pending your action. This will also include transactions that have received final approval or have been denied.
Searching for Existing Transactions:

There are multiple ways you can search for an existing transaction whether it is pending, approved, denied, or one that was begun and saved without being sent on for approval.

**Transaction Number** – The number assigned to the request when it has been submitted or saved for later.

**Position Number** – For “Refill” transactions only. This is the 8 digit CUBS position number. You must enter the leading “0000” to search for the position.

**Effective Date** – For approved transactions only. This is the effective date approved by Classification & Compensation (FTE Requests) or Recruitment (Temporary Requests).

**Submitted Date** – The date the originator submitted the request for approval.

**Transaction Status** – Choose from “Approved”, “Denied”, “Pending”, or “Draft”. *Pending* documents have been submitted for approval but have not received final approval. *Draft* documents have been started and “Saved” but not submitted for approval.

**Department** – The requested department the position was submitted for.

**Job Code** – The requested Job Code for the position.

**Reports to Position Number** – The requested supervisor position number the requested position will be reporting to.

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**Step 2: Viewing the Position Summary Information**

When you pull up the transaction, the first tab you will see is the Position Summary tab. This tab contains all the basic information for the position and is for information purposes only – it is not updateable.
Step 3: Completing Position Requirements

The Position Requirements is the first part of the PD for the position. This information is all updateable and is required.
Fields of Information (Position Location Information):

**Division** – Will default in based on the requested department entered on the Position Summary Tab.

**Section** – Please enter the section the position will be in. An example of a section would be “Human Resources.”

**Unit** – Not all areas use the unit field. **This field is not required and if your area does not use it please leave it blank.** An example of a unit would be “Classification & Compensation.”

**County** – Please type or click the look up and choose the county code for the position’s location.

**City** – Please type the city the position will be located in.
Fields of Information (Job Requirements):

- Minimum Requirements
  - Minimum Requirements must at least meet the state minimum requirements for classified classes.
  - Description: A high school diploma and work experience that is directly related to the area of employment. A bachelor's degree may be substituted for the related work experience.

- Knowledge, Skills, and Abilities
  - Description: What Knowledge, skills, and abilities are needed by an employee upon entry to this job?

- Guidelines and Supervision
  - Description: Describe the guidelines and supervision an employee receives to do this job, including the employee's independence and discretion.

Click to add a row.
Click to view all defaulted rows.
**Additional Requirements** – Three requirements fields default in and are required. They are as follows:

- **Minimum Requirements** – For Classified positions, the State Minimum Requirements are pre-populated based on the requested Job Code and are not updateable. For Unclassified positions, no Minimum Requirements default in and this field is updateable.
- **Knowledge, Skills, and Abilities** – This field is required and must be completed.
- **Guidelines and Supervision** – This field is required and must be completed.

Other Position Requirements may be added. Click on the “+” sign. This will bring up a blank row.

Clicking on the magnifying glass will bring up the available codes to choose from:

- **Additional Comments** – Any additional comments about the position. This could include information about shift differentials, rotating weekends, travel, etc.
- **Physical Requirements** – Include any physical requirements associated with the job. This includes any requirements for heavy lifting, duration of physical activity, etc.
- **Preferred in Addition to Minimum Requirements** – Include any additional education or experience requirements that are preferred for a candidate working in this position.
Step 4: Completing Position Descriptions

The Position Requirements is the first part of the PD for the position. On a Create New, this information is all updateable and is required.

Fields of Information (Job Functions):

Add Organizational Chart – You may attach an Org Chart. (.doc, .docx, .pdf, .ppt, or .pptx)

Code – Click on the magnifying glass to choose whether you’re entering a Job Function or a Job Purpose.

Job Category (Job Function) – Enter a Job Category. This should be a broad label for the function description. An example would be “Fiscal” or “Counseling”.

Description – Describe the job function and duties.
E/M – Choose **Essential** or **Marginal**.

% - Enter the percent time associated with this job function. Percentages must be at least 5% and no more than 95%. All percentages must add up to 100%.

**Fields of Information (Job Purpose):**

*Description* – Enter the Job Purpose. There can be only one job purpose.

**Fields of Information (Supervisory Responsibilities/Additional Comments):**
**Overall Number Supervised** – Enter the total number of employees that are under this position. This includes positions supervised by employees that report directly to this position.

Example – Ben and Ilana report to Richard. Richard reports to Jacob. The overall number supervised for Jacob is 3: Richard, Ben, and Ilana.

**State Title** – Type or choose from the look up the State Title(s) of the position(s) that report to your requested position.

**Number of Employees Directly Supervised** – Type the number of employees in the selected State Title that report directly to the requested position.

**Additional Comments** – Enter any additional comments as needed. This field is not required.

**Save for Later** – If you do not wish to submit the transaction at this time and would like to save it and come back to it later, click the “Save for Later” button.

**Submit** – This is the end of the transaction and there is no additional information that needs to be submitted. You may click “Submit” to send the transaction on for approval. Write down the generated Transaction number for future reference.

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**PreHire Approval Process (Refill)**

The Refill portion of the PreHire Approval Process is very similar to the Create New process with a few key differences.

**Step 1: Navigation**

Please refer to page 1 for detailed instruction on navigating to the application and pending transactions.

**Step 2: Viewing the Position Summary Information**

Unlike a Create New transaction, a Refill transaction has the current position information available for viewing as well as the new information that has been requested. This information is not updateable.
Since this is a refill, the current information associated with the position is now populated on the left under Current Position Information. Any changes to this information is entered in the right under Requested Position Information. If not changes are being made, the fields on the right (Requested Position Information) can be left blank.

**Step 3: Completing the Position Requirements**

Just like the Position Summary Tab, information previously entered for the position is now populating in *(Note: With the initial roll-out of this application, no previous information has been stored so it will not be pre-populating until positions have run through the application at least once.).* If you are not making any changes to the position requirements, you do not have to enter any information.
If you are not changing the previous information for the position, do not enter anything in. If you are, enter the new information in the bottom box.
Step 4: Completing the Position Descriptions

Just like the Position Summary and Position Requirements Tabs, information previously entered for the position is now populating in (Note: With the initial roll-out of this application, no previous information has been stored so it will not be pre-populating until positions have run through the application at least once.). If you are not making any changes to the position requirements, you do not have to enter any information into the bottom boxes.

If you are not changing the previous information for the position, do not enter anything in. If you are, enter the new information in the bottom box.

An action needs to be chosen for each Job Function.
Job Functions – an action needs to be chosen for each Job Function whether there is a change or not. The actions are as follows:

- **Delete** – Choose this action if the entire Job Function needs to be removed.
- **No Changes** – Choose this action if the entire Job Function will remain the same.
- **Update** – Choose this action if you are making any changes to the current Job Function.

If you choose **Delete** or **No Changes** you do not need to enter anything into the bottom box. However, if you choose **Update**, you must enter your changes into the bottom box. This includes the corresponding **Essential/Marginal** and **Percent (%)**.

If multiple positions report to this position, make sure to click “View All” to see them all.
Waiver Approval Process (Create New & Refill)

You have the same functions for a Waiver Approval transaction as you do for a PreHire Approval transaction. All functionality is the same.

Step 1: Navigation

Please refer to page 1 for detailed instruction on navigating to the application and pending transactions.

Step 2: Viewing the Position Summary

There is no change from the PreHire Approval process transaction. Please refer to page 3 (Create New) and 10 (Refill) for further information.

Step 3: Completing the Position Requirements

There is no change from the PreHire Approval process transaction. Please refer to page 4 (Create New) and 11 (Refill) for further information.

Step 4: Completing the Position Descriptions

There is no change from the PreHire Approval process transaction. Please refer to page 8 (Create New) and 13 (Refill) for further information.
Step 5: Viewing the Waived Candidate Information

This information is view only and is not updateable. It includes information on the candidate that is being waived into the position.

Transaction Number: 328
Department: 5301
Position Number:

Requested Action: Assignment to New Position
EmpID: 046443  Candidate Name: Captain Morgan

Is this candidate eligible to work in the United States? ☑ Yes  ☐ No
Underutilized Class(es): None

Candidate Demographic Information
Please provide any of the following demographic information that has been voluntarily provided by the candidate.

Race: White  Gender: Male  Veterans Status: No Military Service

Waiver Justification:
Please state the reason the hiring department is requesting a waiver of job posting and recruitment for this position and provide the training, education and/or experience that uniquely qualifies the candidate for recommendation.

This candidate has been employed in the department in an intermittent position for the last 6 months. He is familiar with CUBS as well as departmental policies & procedures. He has a Bachelor’s Degree in Business Management and has 5 years of Human Resources experience in the private sector. This position is especially vital to the department due to a recent retirement.

Office of Access & Equity Approval

COMMENTS

Save For Later  Approve  Deny
Tracking Your Transaction’s Progress

After you have approved a transaction, you may check on its status and view it at any time (even after final approval has been received):

**Approval Boxes**

Each box in the workflow represents an approver. When an approver approves a transaction, the box changes from blue to green and is marked “Approved” along with the date and time stamp of when it was approved. If the approver denies the transaction, the box turns red, is marked as “Denied”, and the transaction stops. Any approvers in the workflow after the approver who denied the transaction will not get the transaction. If a transaction is denied, the Originator will receive an E-Mail.
notification letting them know the transaction was denied.

Each approval box has a link to the name of the approver. Some boxes say “Multiple Approvers” – if you click on the link, it will pull up a dialog box telling you what approvers are in this approval box. For boxes with multiple approvers, only 1 approval is necessary from any of the individuals listed in order to continue the transaction.

Transaction Status

There are 3 transaction statuses: Pending, Denied, and Approved. A transaction in Pending status has not gone through all the approvers and is still waiting approvals. A transaction in Denied status has been denied by an approver. A transaction in Approved status has gone through all approvers and has received final approval. Both Denied and Approved transactions do not need any further action done to them.