

# Job Builder User Guide - Submitter/Preparer

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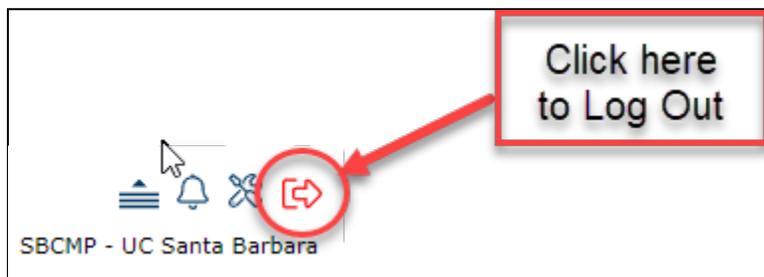
## Log In / Log Out

1. To log in to Job Builder URL: <https://universityofcalifornia.marketpayjobs.com>

1. Log In to Job Builder:



2. Log Out of Job Builder:



# Home Page Navigation

## UC SANTA BARBARA | Job Builder

Welcome  
**Kathryn Moore**

Home Page | My Job Tasks

**1 Tasks**

All Tasks [Search] Clear

Please Review: TEST Job 6 for training Job Description Review

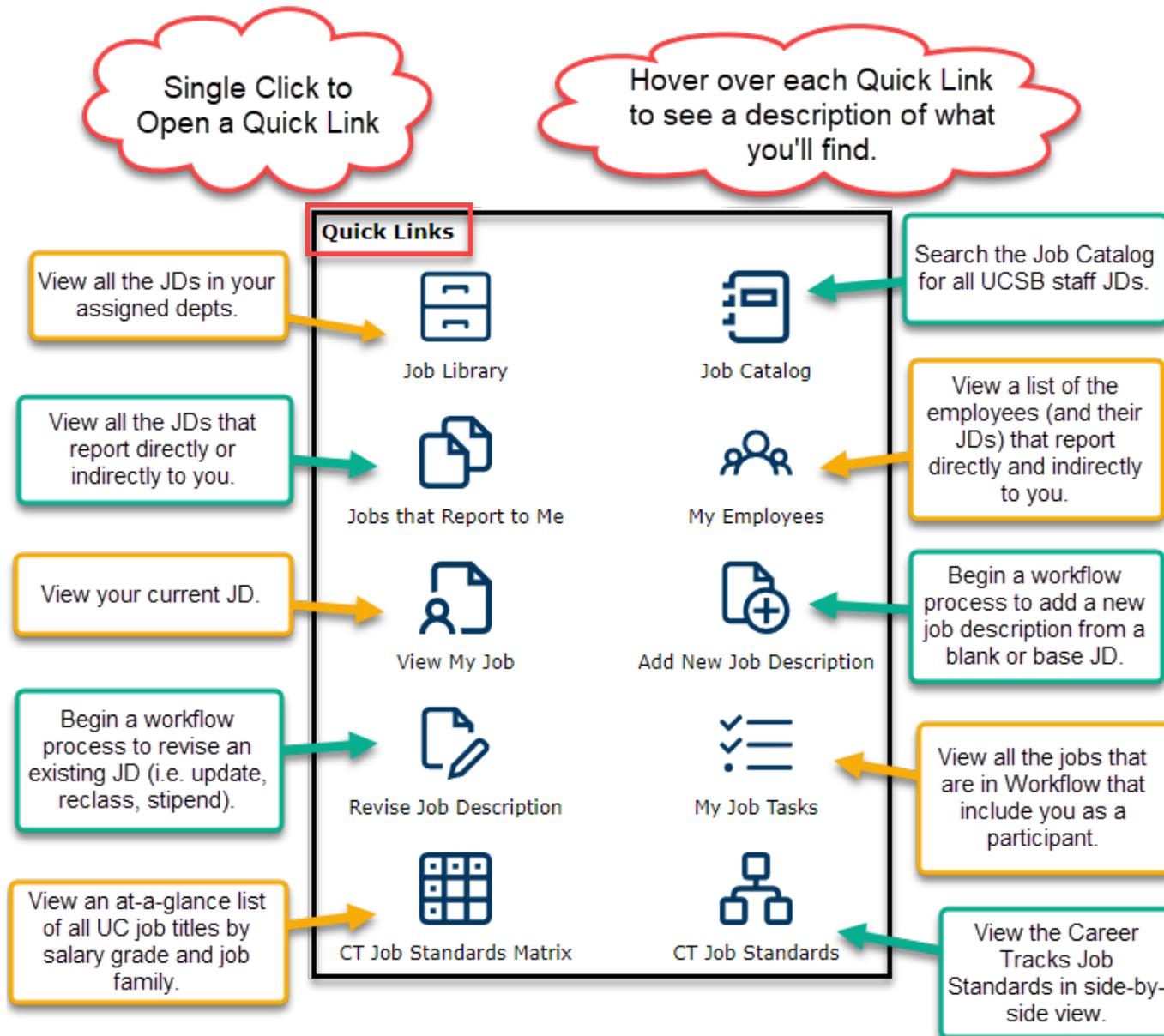
View any jobs that you have in Workflow by double-clicking on the row.

Blue navigation bar menu items contain the same information as the Quick Links.

- Search
  - Job Library
  - Job Catalog
- My Information
  - Jobs that Report to Me
  - My Employees
  - View My Job
- Actions
  - Add New Job Description
  - Revise Job Description
  - My Job Tasks
- Analytics
  - CT Job Standards Matrix
  - CT Job Standards

# Quick Links

1. Quick Links are the quickest way to navigate to the place you want to go.



# View My Job

1. View a print version of your job description in PDF or HTML.

The screenshot shows the UC Santa Barbara job description interface. On the left, there are controls for the job description, including a dropdown for the job title (Administrative Manager 1 (40035501)), a print profile dropdown (Default), and a preview section with radio buttons for PDF Format and HTML Format (HTML is selected). Below the preview are icons for downloading or sharing the job description in Word, PDF, or HTML format, and a share icon. On the right, the job details are displayed under the UC Santa Barbara logo, including the job title (ADMIN MGR 1 (000547) Job Description), a job history/status table, and organization details. A department marketing statement is also visible at the bottom.

**Your payroll title and Position ID**

**Scroll down to see full JD.**

**Click on PDF Format to see a print version.**

**Download (or share) a Word, PDF or HTML version of your JD.**

**UC SANTA BARBARA** ADMIN MGR 1 (000547) Job Description

**Job History/Status**

|                             |                      |
|-----------------------------|----------------------|
| Approved Date:              | 1/1/1900 12:00:00 AM |
| Date Last Edited:           | 1/1/1900 12:00:00 AM |
| Last Action Approved:       | Update               |
| Last Action Effective Date: | 10/1/2021            |

**Organization Details**

|                           |                      |
|---------------------------|----------------------|
| Business Unit (Location): | SBCMP                |
| Department Name:          | PERS HUMAN RESOURCES |
| Division Name:            | Admin Services       |

Department Marketing Statement: The Department of Human Resources is dedicated to providing exemplary customer service in support of teaching, research and the public service mission of UCSB. We are committed to forming strategic partnerships within the UCSB community that create a work environment designed to attract, develop and retain the best qualified people. The department has a staff of 30+ employees and is made up of the following units: Compensation and Classification, Employee Engagement, Employee and Labor Relations, Employee Services (academic

# Jobs that Report to Me

1. All job descriptions for positions that report directly or indirectly to you will appear in a searchable grid, including your own job description.

The screenshot shows a web interface for 'Jobs that Report to Me'. At the top, there are navigation tabs for 'Home Page' and 'Jobs that Report to Me'. Below the tabs is a search bar with a text input field and a dropdown menu currently set to 'All My Jobs'. To the right of the search bar are buttons for 'Org Chart' and 'Export'. Below the search bar are two view options: 'Side-By-Side' and 'Workflow'. The main content is a table with the following columns: Action, Action Requester, Department Name, Position ID, System Title, UC Job Code, UC Payroll Title, and Working Title. The table contains five rows of job data. Callouts provide instructions: 'Narrow your search using the open text search.' points to the search input; 'Narrow your search using the smart search drop-down filters.' points to the dropdown menu; 'View an org chart of all the jobs that report to you.' points to the 'Org Chart' button; 'Export an Excel version of the grid.' points to the 'Export' button; 'Single click on any row then click here to view all details about this JD in Form View' points to the first icon in the 'Action' column; 'Single click on any row then click here to view the employee(s) linked to this JD.' points to the second icon in the 'Action' column; 'Single click on any row then click here to mark JD as a favorite.' points to the heart icon in the 'Action' column; 'Scroll down to see more rows.' points to the vertical scrollbar on the right side of the table; and 'Scroll right to see more columns.' points to the horizontal scrollbar at the bottom of the table.

Home Page | Jobs that Report to Me

Search  X All My Jobs

Org Chart Export

Side-By-Side | Workflow

| Action | Action Requester | Department Name      | Position ID | System Title                        | UC Job Code | UC Payroll Title        | Working Title                               |
|--------|------------------|----------------------|-------------|-------------------------------------|-------------|-------------------------|---|
|        |                  | PERS HUMAN RESOURCES | 40035501    | Administrative Manager 1 (40035501) | 000547      | ADMIN MGR 1 (000547)    | Manager, HR Employee Services               |
|        |                  | PERS HUMAN RESOURCES | 40071064    | Administrative Officer 2 (40071064) | 007376      | ADMIN OFCR 2 (007376)   | HR Office Manager                           |
|        |                  | PERS HUMAN RESOURCES | 40074139    | Administrative Officer 2 (40074139) | 007376      | ADMIN OFCR 2 (007376)   | Workforce Administration Specialist         |
|        |                  | PERS HUMAN RESOURCES | 40074435    | Benefits Analyst 2 (40074435)       | 007719      | BENEFITS ANL 2 (007719) | Leave Program Coordinator                   |
|        |                  | PERS HUMAN RESOURCES | 40077113    | Benefits Analyst 2 (40077113)       | 007719      | BENEFITS ANL 2 (007719) | Transitional Work Program (TWP) Coordinator |
|        |                  | PERS HUMAN RESOURCES | -----       | Benefits Analyst 2                  | -----       | BENEFITS ANL 2          | -----                                       |

# My Employees

1. View a list of the employees (and their JDs) that report directly and indirectly to you.

The screenshot shows the 'My Employees' page with several callouts:

- Narrow your search using the open text search.** (points to the search bar)
- Narrow your search using the smart search drop-down filters.** (points to the Filter dropdown)
- View an org chart of all the jobs that report to you.** (points to the Org Chart button)
- Export an Excel version of the grid.** (points to the Export button)
- Single click on any row then click here to view details about this employee.** (points to the magnifying glass icon in the Action column)
- Click OFF to see all direct AND indirect reports.** (points to the Direct Reports Only toggle switch)
- Scroll down to see more rows.** (points to the bottom of the table)
- Single click on any row then click here to view the employee(s) JD in Form View.** (points to the document icon in the Action column)
- Single click on any row then click here to share this JD with the employee.** (points to the share icon in the Action column)
- Scroll right to see more columns.** (points to the right edge of the table)

| Action | Department           | Emplid | Position ID | Employee Name | UC Job Code | UC Payroll Title                   |
|--------|----------------------|--------|-------------|---------------|-------------|------------------------------------|
|        | PERS HUMAN RESOURCES |        | 40031426    |               | 007395      | PROJECT POLICY ANL SUPV 2 (007395) |
|        | PERS HUMAN RESOURCES |        | 40077113    |               | 007719      | BENEFITS ANL 2 (007719)            |
|        | PERS HUMAN RESOURCES |        | 40066604    |               | 000495      | LABOR REL REPR 4 (000495)          |
|        | PERS HUMAN RESOURCES |        | 40030406    |               | 000621      | EMPLOYMENT MGR 1 (000621)          |
|        | PERS HUMAN RESOURCES |        | 40036352    |               | 007721      | BENEFITS ANL 4 (007721)            |
|        | PERS HUMAN RESOURCES |        |             |               |             | LABOR REL MGR 2                    |

# Job Library

1. The Job Library lists all the job descriptions in your assigned departments.

The screenshot shows the Job Library interface with several callouts:

- Narrow your search using the open text search.** (Green box pointing to the search bar)
- Narrow your search using the smart search drop-down filters.** (Green box pointing to the Filter dropdown)
- Click OFF to see all active and inactive jobs (i.e. filled vs. vacant).** (Red box pointing to the 'Show Active Jobs Only' toggle)
- Export an Excel version of the grid.** (Yellow box pointing to the 'Export' button)
- Double click on a row to open up the Form View of the JD.** (Yellow box pointing to a row in the table)
- Single click on any row then click here to mark the JD as a favorite.** (Yellow box pointing to a heart icon in the Action column)
- Scroll right to see more columns.** (Red box pointing to the right edge of the table)
- Scroll down to see more rows.** (Red box pointing to the bottom of the table)
- See next page for an explanation.** (Teal bubble pointing to a help icon in the right sidebar)

| Action | ID    | Department Name      | Position ID | System Title   | UC Job Code | UC Payroll Title        | Working/Business Title                      | Employee |
|--------|-------|----------------------|-------------|--|-------------|-------------------------|---|----------|
|        |       |                      |             | administrative professional support to the HR department. Responsible for the campus   |             |                         | Specialist                                  |          |
| ♥      | 43034 | PERS HUMAN RESOURCES | 40074435    | Benefits Analyst 2 (40074435)<br>The Leave Coordinator manages, plans and administers the leave processes for staff. Participates in the ongoing development of centralized leave services         | 007719      | BENEFITS ANL 2 (007719) | Leave Program Coordinator                   | Staff: C |
|        | 43035 | PERS HUMAN RESOURCES | 40077113    | Benefits Analyst 2 (40077113)<br>The Transitional Work Program (TWP) Coordinator is responsible for administering the campus return to work/transitional work program for employees with temporary | 007719      | BENEFITS ANL 2 (007719) | Transitional Work Program (TWP) Coordinator | Staff: C |
|        |       | PERS HUMAN           | 40071437    | Blank Assistant 3 (40071437)<br>Under the general supervision of the Leave Administration  | 007719      | BLANK AST 3             | Benefits                                    | Staff: C |

# Job Library (continued)

Job Library

Filter  Advanced  Show Active Jobs Only Export Archives

Viewed Department Name - PERS HUMAN

None Select All Selected: 1

| Department Name      | Position ID | System Title   | UC Job Code | UC Payroll Title        | Working/Business          |
|----------------------|-------------|--|-------------|-------------------------|---------------------------|
|                      |             | administrative professional support to the HR department. Responsible for the campus |             |                         | Specialist                |
|                      |             | <b>Benefits Analyst 2 (40074435)</b>   |             |                         |                           |
| PERS HUMAN RESOURCES | 40074435    | The Leave Coordinator manages, plans and administers the leave                       | 007719      | BENEFITS ANL 2 (007719) | Leave Program Coordinator |

158 Records Max Records 300

Preview Employees

Click on the carrot to open another menu

| Action | ID    | Department Name      | Position ID | System Title  |
|--------|-------|----------------------|-------------|---|
| ♥      | 41819 | PERS HUMAN RESOURCES | 40074139    | The Workforce Specialist provides administrative support to the HR department. Responsible for the campus   |
| ♥      | 43034 | PERS HUMAN RESOURCES | 40074435    | <b>Benefits Analyst 2 (40074435)</b><br>The Leave Coordinator manages, plans and administers the leave processes for the campus in the ongoing centralized leave program. |
| ♥      | 43035 | PERS HUMAN RESOURCES | 40077113    | <b>Benefits Analyst 2 (40077113)</b><br>The Transition (TWP) Coordinator is responsible for the campus work/transition processes for employees.                           |

Preview

Default PDF HTML Print

**UC SANTA BARBARA** BENEFITS ANL 2 (007719) Job Description

**Job History/Status**

|                        |                      |
|------------------------|----------------------|
| Approved Date:         | 1/1/1900 12:00:00 AM |
| Date Last Edited:      | 9/27/2021 7:00:17 PM |
| Last Action Approved:  | Update               |
| Last Action Effective: | 9/1/2021             |

Preview the JD for the row you highlighted.

System Title

Administrative Officer 2 (40074139)

The Workforce Administrative Specialist provides a variety of administrative professional support to the HR department. Responsible for the campus

**Benefits Analyst 2 (40074435)**

The Leave Coordinator manages, plans and administers the leave

Employees

Filter

**Assign To Employees** Assign to Another Job

| Action | Emplid | Employee Name | Title and Position ID         | Supervisor's Name |
|--------|--------|---------------|-------------------------------|-------------------|
|        |        |               | Benefits Analyst 2 (40074435) |                   |

View the employee(s) linked to the row you highlighted.

# Job Catalog

1. Search for and view UCSB staff (non-student) job descriptions.
2. Search by Position ID, Job Code, Job Title, or Job Family

The screenshot shows the Job Catalog interface with several callouts:

- Search by Position ID in the open search text box:** Points to the search input field.
- Narrow your search using pre-defined search filters:** Points to the dropdown menus for Department, Payroll Title, and System Title.
- Click on the carrot to view the Job Posting details for the highlighted row:** Points to the left-pointing arrow icon in the top right corner of the table.
- Double click on a row to view a PDF version of the JD:** Points to the highlighted row for the Administrative Manager 1 position.

| Department           | Position ID | System Title   | UC Payroll Title     | Working/Business Title        | Union Code           |
|----------------------|-------------|--|----------------------|-------------------------------|----------------------|
|                      |             | Officer of the Department of Chemical Engineering. Directs   |                      |                               |                      |
| PERS HUMAN RESOURCES | 40035501    | <b>Administrative Manager 1 (40035501)</b><br>Reporting to the Director of Human Resources, this position exercises management responsibility for the Employee Services unit and | ADMIN MGR 1 (000547) | Manager, HR Employee Services | 99 - Non-Represented |
| HASC HSSB ADMIN      | 40035516    | <b>Administrative Manager 1 (40035516)</b><br>Under the general direction of   | ADMIN MGR 1          | Director, HSSB Administrative | 99 - Non-            |

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# My Job Tasks

1. The My Job Tasks Quick Link will only appear on your home page if you have job actions in some state of workflow (drafted, submitted, etc.).

This Quick Link will only be available if you are involved in any active workflows.

The status of all JD actions in workflow will be listed here.

The edit icon allows you to open Form View.

The Compare Revision icon allows you to see a side-by-side comparison of what's been revised in the JD.

The screenshot displays the 'My Job Tasks' section of a web application. At the top, there are navigation tabs for 'Home Page' and 'My Job Tasks'. Below the tabs is a search bar with the text 'In Progress Workflows' and a search icon. A table lists job actions with columns for Action, Action Request, Department Name, UC Payroll Title, Working/Business Title, and Position ID. Two rows are visible: one for 'TEST Job 6 for training' and another for 'TEST Job 5 for training'. A callout box highlights the 'My Step: Action Required' status for the first row, showing the user 'Lisa Romero' and the approver 'Linda B'. Another callout box highlights the 'Step Approved' status for the second row, showing the user 'Lisa Romero' and the approver 'Kathr'. A third callout box points to the 'Workflow History' and 'Export' buttons. A fourth callout box points to the 'Compare Revision' icon in the table.

| Action | Action Request | Department Name      | UC Payroll Title             | Working/Business Title  | Position ID | Workflow Process                                   |
|--------|----------------|----------------------|------------------------------|-------------------------|-------------|--|
|        |                | PERS HUMAN RESOURCES | FINANCIAL SVC ANL 2 (004627) | TEST Job 6 for training | TBD_199     | My Step: Action Required<br>Lisa Romero<br>Linda B |
|        | Create New JD  | PERS HUMAN RESOURCES | ADMIN OFCR 3 (007377)        | TEST Job 5 for training | TBD_197     | Step Approved<br>Lisa Romero<br>Kathr              |

# CT Job Standards Matrix

1. View an at-a-glance matrix of all the UC job titles by salary grade and job family.

The screenshot shows the 'CT Job Standards Matrix' interface. At the top, there are navigation tabs for 'Home Page' and 'CT Job Standards Matrix'. Below this is a search bar with a 'Filter' dropdown, a search icon, and a 'Show Active Jobs Only' toggle. A vertical list of job families is on the left, with 'Human Resources' highlighted. The main area displays a table of job standards for 'Academic Human Resources' and 'Benefits'. A job title 'ACAD HR MGR 3 (000596)' is highlighted in red. Callouts provide instructions: 'Click on the carrot to open the vertical Job Family list.' (pointing to the left arrow), 'Click on a Job Family to narrow your search of job codes appearing in the matrix.' (pointing to 'Human Resources'), 'Hover over the carrots to view the Job Families as they scroll left and right.' (pointing to the right arrow), and 'Double click on a job title to open a print version of the job standard.' (pointing to the highlighted job title).

Home Page | **CT Job Standards Matrix**

Search × Filter ▼ 🔍 Advanced 🔴 Show Active Jobs Only ⋮

Selected Jobs (0) Clear Selected

- Facilities Development and EHS
- Finance
- General Administration
- General Services
- Governmental Relations
- Healthcare Strategy
- Human Resources**
- Information Technology
- Investment Management
- Legal Services
- Library Services
- Marine
- Medical Imaging
- Museum Services
- Nursing
- Patient Support Services
- Performing Arts
- Physician
- Quality Management
- Radiation Oncology
- Rehabilitation Services
- Research Administration
- Research and Laboratory Services
- Respiratory Services
- Security and Public Safety
- Skilled Crafts and Trades
- Sports and Recreation

These functions describe the work performed at the University to support our staff and academic employee resources.

| Grade    | Academic Human Resources                          | Benefits  | Benefits Pr...     |
|----------|---|---|--------------------|
| Grade 30 |   |   | BENEFITS PRG STRAT |
| Grade 28 | <b>ACAD HR MGR 3 (000596)</b>                     | BENEFITS MGR 3 (000290)                                 | BENEFITS PRG STRAT |
| Grade 27 |   | BENEFITS MGR 2 (000291)                                 | BENEFITS PRG STRAT |
| Grade 26 | ACAD HR ANL 5 (000593)<br>ACAD HR MGR 2 (000595)  | BENEFITS ANL 5 (000292)                                 | BENEFITS PRG STRAT |
| Grade 25 | ACAD HR MGR 1 (000594)                            |   | BENEFITS PRG STRAT |
| Grade 24 | ACAD HR ANL 4 (007716)<br>ACAD HR SUPV 2 (007711) | BENEFITS MGR 1 (000614)                                 | BENEFITS PRG STRAT |
| Grade 23 | ACAD HR ANL 4 GF (005894)                         | BENEFITS ANL 4 (007721)                                 |                    |
| Grade 22 | ACAD HR ANL 3 (007715)                            | BENEFITS SUPV 2 (007723)<br>BENEFITS SUPV 2 GF (006643) | BENEFITS PRG STRAT |
| Grade 21 |   | BENEFITS ANL 3 (007720)                                 |                    |

# CT Job Standards

1. View or download the CT Job Standards.

1

Click on the 3-dot menu to bring up a list of CT Job Families.

Home Page CT Job Standards

Select Job Function

View Side-By-Side Download Job Standards

Click here to see a side-by-side version of the CT Job Standards.

Detailed description: This screenshot shows the top portion of a web application. At the top left, there is a 'Home Page' link and a 'CT Job Standards' tab. Below this is a 'Select Job Function' section with a search input field and a three-dot menu icon. At the bottom of this section are two buttons: 'View Side-By-Side' and 'Download Job Standards'. A red callout box with the number '1' points to the three-dot menu, with text: 'Click on the 3-dot menu to bring up a list of CT Job Families.' Another red callout box with the number '2' points to the 'View Side-By-Side' button, with text: 'Click here to see a side-by-side version of the CT Job Standards.'

2

Select Job Function

Select and Close

Search/Filter: [input] [search icon] Clear

- General Services
  - Governmental Relations
  - Healthcare Strategy
  - Human Resources
    - Academic Human Resources
    - Benefits
    - Benefits Program Strategy
    - Compensation
    - Employee Health Services RN

Search for and select a job function within a job family.

Detailed description: This screenshot shows a 'Select Job Function' dropdown menu. At the top is a 'Select and Close' button. Below it is a 'Search/Filter:' section with an input field, a search icon, and a 'Clear' link. The dropdown list is expanded, showing a tree structure of job families. Under 'Human Resources', the 'Compensation' item is highlighted. A red callout box with the number '2' points to the search input field, with text: 'Search for and select a job function within a job family.'

# CT Job Standards (continued)

**Side-By-Side View** 3

Reset   **Export as Excel**   Edit Profiles

Selected Jobs: 11 Jobs Selected   **Export this grid to Excel.** ▾

Highlight Differences    Hide Identical Rows

**Job Function: Compensation**  
*Involves developing, implementing and administering compensation policies and programs. Reviews job evaluation requests and proposals, and provides advice on job evaluation, position management, and position salary-setting.*

**Job Family: Human Resources**  
*These functions describe the work performed at the University to support our staff and academic employee resources.*

|  | Compensation Analyst 1 <span style="float: right;">×</span>  | Compensation Analyst 2 <span style="float: right;">×</span>   |
|--|--|---|
| Classified Indicator Descr (Pers Prog) | PSS  | PSS   |
| Job Level                              | Entry  | Intermediate  |
| Salary Grade                           | Grade 20   | Grade 21  |
| FLSA Status                            | Non-Exempt   | Non-Exempt  |
| CT Generic Scope Description           | Entry-level professional with limited prior experience; learns to use professional concepts to resolve problems of limited scope and complexity; works on assignments that are initially routine in nature, requiring limited judgment and decision making. Employees at this level are expected to acquire the skills and knowledge to perform more advanced work following an agreed upon time in position, through defined training and development planning. | Professional who applies acquired job skills, policies, and procedures to complete substantive assignments / projects / tasks of moderate scope and complexity; exercises judgment within defined guidelines and practices to determine appropriate action. |

Scroll to the right to see all the job titles in this job function.

Scroll down to see all sections of the CT Job Standard.

## Add a New JD from a **Blank Job**

- a. Creating a new blank job description allows you to use a template JD that is pre-filled with job code related attributes and information from the Career Tracks job standards.

The screenshot shows a web interface for creating a new job description. At the top, there is a 'Choose a Template' section with two options: 'Blank Job' (indicated by a red circle 1) and 'Select Base Job'. Below this, the form fields are as follows:

- Position ID:** TBD\_202
- New Job Title:** TEST Job 7 for Training (indicated by a red circle 2)
- Unique Job Name:** (TBD\_202)
- Job Standard:** Select Job Standard (indicated by a red circle 3)
- Select Workflow:** Submitter Workflow (2 steps) (indicated by a red circle 4)
- Department Initiates Action:** Lisa Romero
- HR/Comp Reviews:** Select HR/Compensation (indicated by a red circle 4)
- Start Workflow:** A blue button at the bottom right (indicated by a red circle 5)

Additional callouts provide instructions: 'Click on Blank Job to use a CT Job Standard to pre-fill your JD.' (red box), 'Enter in a Working/Business title.' (green box), 'Select a template CT job standard to populate the new JD. See next few pages for instructions.' (yellow box), 'A 2 or 3 step workflow will automatically be assigned based on your user role (Preparers have 3 steps, Submitters have 2 steps.)' (red box), and 'Click here to assign an HR/Comp Reviewer. See next few pages for instructions.' (red box).

## Add a New JD from a **Blank Job** (continued)

- This is a continuation of #3 above - select the Job Standard template.

The screenshot shows a two-step process for selecting a job standard template. Step 3 (top) shows the 'Select Parent for the new Job Description' screen with a 'Save and Close' button and a 3-dot menu. Step 1 (middle) shows the 'Select Job Standard for 'TEST Job' screen with a search bar containing 'compensation' and a 'Filter' dropdown. Step 2 (bottom) shows a table of job standards with a 'Save Job Standard' button and a 'Side-By-Side' option.

**3** Select Parent for the new Job Description

Click the 3-dot menu to bring up a list of CT job standard templates to choose from.

Save and Close

Job Standard

Parent/Child Settings File  
UCSB Master Template

**1** List of CT Job Standards to choose from

**1** Type in the job title or job code that you want.

Or, use the smart filter to find the job template you want.

Search  
compensation | X Filter [dropdown] [magnifying glass icon] Advanced [toggle] Same Job Family Only

Selected Job (TBD\_202) [copy icon]

Job Code TBD\_202

Job [input field]

Job Family [input field]

Job Function [input field]

**3** Save the job standard to be added to your blank job.

Save Job Standard Side-By-Side

**2** Click once to highlight the row you want.

| Action      | System ID | Job Code | UC Payroll Title                  | Unabbreviated Payroll Title  | Salary Gra |
|-------------|-----------|----------|-----------------------------------|------------------------------|------------|
| [copy icon] | 33419     | 004500   | ACAD ACHIEVEMENT CNSLR 2 (004500) | Academic Achievement Cnslr 2 | Grade 19   |
| [copy icon] | 33420     | 004501   | ACAD ACHIEVEMENT CNSLR 3 (004501) | Academic Achievement Cnslr 3 | Grade 20   |
| [copy icon] | 33421     | 004502   | ACAD ACHIEVEMENT CNSLR 4 (004502) | Academic Achievement Cnslr 4 | Grade 22   |

## Add a New JD from a [Blank Job](#) (continued)

- This is a continuation of #4 from above - select the HR/Comp Reviewer.

4

Add Ad Hoc

| Emplid   | Employee Name        | Reports To           | Is JD Manager? | Is Indirect Mgr? | Is JD Admin? | Is J |
|----------|----------------------|----------------------|----------------|------------------|--------------|------|
| 10039591 | Broen,Linda Carolyn  | Moore,Kathryn Poling | False          | False            | True         | Fals |
| 10080169 | Dittman,Andrea       | Moore,Kathryn Poling | False          | False            | False        | Fals |
| 10260836 | Fudge,Anna Katherine | Moore,Kathryn Poling | False          | False            | False        | Fals |
| 10072173 | Hudgens,Deborah Lynn | Moore,Kathryn Poling | False          | False            | False        | Fals |
| 10071707 | Ibach,John Thomas    | Moore,Kathryn Poling | False          | False            | False        | Fals |
| 10037304 | Moore,Kathryn Poling | Romero,Lisa G        | False          | False            | True         | Fals |

Click once on a row to highlight the HR/Comp Reviewer.

Click here to add the HR/Comp Reviewer to the workflow process.

Add Participant

5

Click here to officially start the Workflow process.

Start Workflow

Job Workflow Start Report

Job Revision Workflow(s)

| Action  | Job                              | Details               |
|---|----------------------------------|-----------------------|
|  | Compensation Analyst 2 (TBD_203) | Revision was started. |

Click on the View/Edit icon to open up the Workflow process. This will allow you to begin editing the job description.

----> Skip to [Job Description Workflow Process](#)

## Add a New JD from a **Base Job**

- Creating a new job description from a base job description (current JD in the job catalog) enables the automatic copying of many sections and fields into your new job description.

1

Choose a Template

or

Click here to select an existing job in the UCSB job catalog to pre-fill your JD.

Search for an existing JD by typing in the position ID, job code, or payroll title name.

2

Search Content Library

Search Jobs for

× All Job Families and Job Functions

Search in Results

×  No Jobs to Display

Use the smart filters to search for an existing JD by job family or function.

## Add a New JD from a Base Job (continued)

Search Content Library

Search Jobs for

financial services analyst 2

All Job Families and Job Functions

Reset Search

Found 50 Jobs

Sources

Help

Financial Work-Study Analyst

Financial Analyst

TEST Training Job Financial Analyst

Special Projects-Senior Financial Analyst

Financial Services Analyst 3

Search in Results

Filter

50 Jobs Displayed

Financial Work-Study Analyst

Company Jobs

Financial Analyst

Company Jobs

TEST Training Job Financial Analyst

Company Jobs

Special Projects-Senior Financial Analyst

Company Jobs

Financial Services Analyst 3

Company Jobs

Financial Work-Study Analyst

Reporting to the Fiscal Analyst, assists the Fiscal Operations unit in meeting its goal of providing sound oversight of Federal, State and Institutional student aid funds. Reconciles major Federal Title IV student aid program accounts (PELL, TEACH, DL, Perkins Work-Study) and processing

Save and Close

3

By typing in a payroll title, the system presented search results based on the closest matches to this title.

"Company Jobs" is another name for UCSB jobs.

The General Summary for the UCSB job highlighted is displayed here.

Hover over a title to see the Position ID and General Summary.

Scroll down to see all jobs listed.

Click here once you've made your selection.

## Add a New JD from a Base Job (continued)

A temporary number is assigned to the JD until you request a Position ID.

Enter in the unique Working/Business Title for your JD.

4

This is the CT job standard that will auto-populate your JD, in addition to the other fields that will be copied over.

Position ID: TBD\_205

New Job Title: TEST Job 3 for Training

Unique Job Name: Financial Services Analyst 2 (TBD\_205)

Job Standard: FINANCIAL SVC ANL 2 (004627)

Select Workflow: Submitter Workflow (2 steps)

A 2 or 3 step workflow will automatically be assigned based on your user role (Preparers have 3 steps, Submitters have 2 steps.)

Department Initiates Action: Lisa Romero

HR/Comp Reviews: Andrea Dittman

Because you selected a JD from the UCSB job catalog, the HR Comp Reviewer is copied over. This will change later once you assign a different department to this new JD.

Click here to officially start the Workflow process.

Start Workflow

5

Job Revision Workflow(s)

| Action  | Job                                    | Details               |
|---|--|-----------------------|
|  | Financial Services Analyst 2 (TBD_205) | Revision was started. |

Click on the View/Edit icon to open up the Workflow process. This will allow you to begin editing the job description.

----> Skip to [Job Description Workflow Process](#)

## Revise a JD (Update, Reclass, Stipend)

1. Use the "Revise a Job Description" action for JD updates, reclasses or temporary stipends.

The screenshot shows a web interface for managing job descriptions. At the top, a 'Selected Job(s)' section contains a table with columns: Action, Job ID, Job Code, Job Name, and Version. An 'Add Job' button is located to the right of this table, circled with a red circle and labeled '1'. Below this is a search window with a search bar containing 'TEST job', a 'Filter' dropdown, and a search icon. A callout box labeled '2' points to the search bar with the text: 'Search for the JD you wish to revise using the text box or smart filters.' To the right of the search bar, a callout box labeled '1' points to the search icon with the text: 'Click here to bring up a search window of all the JDs in your assigned'. Below the search bar is a table with columns: ID, Position ID, UC Payroll Title, Working/Business Title, Department, Num EEs, Version, and Current Reviewer. The table contains five rows of job data. The third row is highlighted in grey. A callout box labeled '3' points to this row with the text: 'Click once to highlight the JD you wish to revise.' Below the table is a 'Selected Jobs (1)' section showing 'Administrative Officer 3' with a red 'x' icon. A callout box labeled '4' points to this section with the text: 'Make sure you've only selected one JD.' At the bottom right of the interface is a 'Select and Close' button, circled with a red circle and labeled '5'. A callout box labeled '5' points to this button with the text: 'Click here to continue.'

| ID                                  | Position ID | UC Payroll Title | Working/Business Title | Department              | Num EEs | Version | Current Reviewer |
|-------------------------------------|-------------|------------------|------------------------|-------------------------|---------|---------|------------------|
| <input type="checkbox"/>            | 56909       | TBD_153          | ADMIN OFCR 3 (007377)  | TEST Job for Training   |         | 0 0     |                  |
| <input type="checkbox"/>            | 60652       | TBD_162          | ADMIN OFCR 3 (007377)  | TEST Job 2 for training |         | 0 0     | Moore,Kathryn F  |
| <input checked="" type="checkbox"/> | 60654       | TBD_163          | ADMIN OFCR 3 (007377)  | TEST Job 3 for Training |         | 0 0     |                  |
| <input type="checkbox"/>            | 60911       | TBD_186          | ADMIN OFCR 3 (007377)  | TEST Job for Training   |         | 0 0     |                  |
| <input type="checkbox"/>            | 60921       | TBD_197          | ADMIN OFCR 3 (007377)  | TEST Job 5 for training |         | 0 0     | Moore,Kathryn F  |

## Revise a JD (Update, Reclass, Stipend) (continued)

Selected Job(s)

| Action  | Job ID | Job Code | Job Name                           | Version |
|---|--------|----------|------------------------------------|---------|
|   | 60654  | TBD_163  | Administrative Officer 3 (TBD_163) | 0       |

**Add Job**

Select Workflow

Submitter Workflow (2 steps)  

A 2 or 3 step workflow will automatically be assigned based on your user role (Preparers have 3 steps, Submitters have 2 steps.)

| Department Initiates Action   | HR/Comp Reviews   |
|---|---|
| Lisa Romero   | Kathryn Moore   |
|  |  |

Click here to officially start the revision workflow process.

**Start Workflow**

----> Skip to [Job Description Workflow Process](#)

# Job Description Workflow Process

1. The Job Description workflow process consists of 14 sections, 12 of which require editing.

## Section 1 - Job Details

Red Dots indicate there are required fields that need to be filled out in that section.

These are all the different sections of the workflow process.

Save and Close Discard Draft Workflows

Spell check Employees Preview Pane Split Screen Form Errors (47)

This Job is in Workflow: Action Required

TEST Job 3 for Training Edit

Click the Edit button to begin editing this JD.

Scroll down to complete all parts of the section.

Please remember to save your work

### JOB DETAILS

#### Job History/Status

Archive this Job Description? No

Approved Date: 1/1/1900 12:00:00 AM (PST)

Date Last Edited: 1/1/1900 12:00:00 AM (PST)

Last Action Approved: Update

Last Action Effective Date: 9/1/2021

Action Requested:

Use the drop down to select the type of action you're requesting (i.e. Create New JD, Update, Reclass, etc.).

#### Organization Details

Business Unit (Location): SBCMP

Department Name: DEVL DEVELOPMENT

Division Name: Instl Advcmt

Sub-Division: n/a

Click here to assign the correct dept for this JD.

Always save your work before moving to the next section in workflow.

Previous Next Save

## Section 1 - Job Details (continued)

TEST Job 3 for Training  Edit

### Position Details

|  |  |
|--|--|
| Position ID:                                 | TBD_205                                |
| UC Payroll Title:                            | FINANCIAL SVC ANL 2 (004627)           |
| UC Job Code:                                 | 004627                                 |
| ? System Title:                              | Financial Services Analyst 2 (TBD_205) |
| Working/Business Title:                      | TEST Job 3 for Training                |
| CT Job Family:                               | Finance                                |
| CT Job Function:                             | Financial Services                     |
| Classified Indicator Descr (Pers Prog):      | PSS                                    |
| Salary Grade:                                | Grade 19                               |
| FLSA Status:                                 | Non-Exempt                             |
| ? FLSA Override:                             |  |
| Employee Class (Appt Type):                  | 2 - Staff: Career                      |
| Rehired Retiree?                             | No                                     |
| Union Code (Collective Bargaining Unit):     | 99 - Non-Represented (PPSM)            |
| ERC (Empl Rels Code):                        | E-All Others - Not Confidential        |
| ? % of Time (not FTE):                       | 100                                    |
| Working Days and Hours:                      | M-F; 7:30am - 4:30pm                   |
| ? Work Location (building, office, cubicle): | Cheadle Hall - 4219                    |

Click or hover over the help bubbles for more information.

4  
Continue filling out all editable fields.

## Section 1 - Job Details (continued)

Eligible for Remote Work? Yes

Type of Remote Work Arrangement: Hybrid (Both UC & Non-UC locations)

**Use to view and edit Job Descriptions from this Job Function side-by-side:**

View Side-by-Side: Financial Services

[Show Side-by-Side View](#)

[Click here to view the Side-by-Side comparison of jobs this Job Family](#)

Previous  Next  **Save**

5

When you get to the end of the section, be sure and save your work before continuing on to the next section.

Click here to return to the section WITHOUT SAVING.

Click here to SAVE your work and return to the section.

6

[Continue Editing](#) [Close Form with Errors](#)

**One or more errors were detected.**

| Tab Page         | Element/Field                       | Error Message        |
|------------------|-------------------------------------|----------------------|
| Job Details      | Action Requested:                   | Action Requested:    |
| Supervision      | Supervisor's Payroll Title:         | Supervisor's Payroll |
| Qualifications   | Work Experience                     | Work Experience is   |
| PEM Requirements | Physical Requirements [Crawling, 7] | Physical Requireme   |

If you missed any required fields they would be listed here, in order by section.

## Section 2 - Supervision

Click or hover over the help bubbles for more information.

1 Manually enter name of supervisor, their PAYROLL title, and name of dept head.

2 Select the level of supervision received.

3 Manually add the names, payroll titles, and % of time for every CAREER employee supervised.

4 Enter other non-career positions supervised.

5 SAVE your work before continuing on.

Save

**SUPERVISION**

Name of Supervisor: Kathy Moore

Supervisor's Payroll Title: Compensation Manager 1

Name of Department Head: Vacant (TBD)

**Level of Supervision Received**

A statement which describes the level of independence for this position. Check only ONE of the following boxes.

CLOSE SUPERVISION

SUPERVISION

GENERAL SUPERVISION

DIRECTION

GENERAL DIRECTION

**Names and Payroll Titles of Career Employees Directly Supervised**

Add Delete Row Undo

| Name       | Payroll Title          | % of Time |
|------------|------------------------|-----------|
| John Doe   | Compensation Analyst 3 | 100       |
| Jane Smith | Compensation Analyst 3 | 100       |

**Legacy Names and Payroll Titles of Career Employees Supervised**

Add Delete Row Move Up Move Down

N/A

**Other Positions Supervised (limiteds, contracts, and students)**

Other Positions Supervised (Contract, Limited, Student Assistants, etc.)

Blank Assistant 2, 50%, Limited  
1-3 Student Assistants

Previous Next Save

## Section 3 - Job Summary

**JOB SUMMARY**

*General Summary of Job Duties and Responsibilities*

Content Library Full Screen

Financial & Business Operations Analyst Under the general direction of the Associate Business Operations Analyst ("Analyst") plays a key role in the efficient functioning of the departments of Public Affairs and Communications ("OPAC"). Primary responsibilities focus on Supplies & Expense reporting and, office operations for DEVL (\$1.5M+ annual S&E) & OPAC (\$225K+ annual S&E). Business Manager, maintains database of all departmental expenditures, completes monthly expense reports and summaries. Serves as the back-up to the Associate Business Manager and Financial Analyst. Assists the Associate Business and Financial unit for the Division of Institutional Advancement ("IA") with the coordination of departmental Time Leave requests, and maintains departmental personnel files. Assists the Associate Business Manager and the entire Business & Financial Operations team with the day-to-day departmental financial and office operations support. Ensures financial control in all aspects, payroll, vendor contracts and payments, financial paperwork, travel and entertainment. Communicates with development staff, vendors and campus providers with a

*CT Job Function Summary*

Involves the processing and servicing of a variety of operational, personnel, and financial transactions, including payroll, accounts receivable, accounts payable, purchasing, recharge billing, travel / entertainment collection and data entry, analysis, review and control, customer servicing, and reporting.

*CT Generic Scope Description*

Professional who applies acquired job skills to substantive assignments / projects / tasks of moderate scope and complexity; exercises judgment to determine appropriate action.

*CT Custom Scope Description*

Uses professional financial services concepts. Applies organization policies and procedures to resolve a variety of moderately complicated issues. Works on financial services problems of moderate scope where analysis of situations or data requires a review of a variety of factors.

Enter or revise the general summary of duties unique to this JD.

OPTIONAL: Click on Content Library to search a large database of general summary statements related to this JD.

The grey shaded areas are auto-filled based on the payroll title of the JD and are there for your reference only.

SAVE your work before continuing on.

Previous Next Save

# Section 4 - Essential Functions and Duties

**ESSENTIAL FUNCTIONS AND DUTIES**  
 For Reference Only - Key Responsibilities from CT Job Standard

- Applies professional financial and accounting concepts to independently perform services such as researching discrepancies and tax implications and compliance
- Prepares reports and analyses to include summaries of financial transactions, e for management review and decision-making.

The key responsibilities from the CT Job Standard are here for your reference only. You can copy and paste whatever applies to your unique JD.

Right click on a row to copy and paste it to the editable duties section below.

1 Manually add/revise functions and duties.

2 Cut and paste duty statements from the Key Responsibilities above or from the Content Library.

4 Non-essential duties are peripheral, incidental, or minimal duties that would not adversely affect the job if removed.

**Essential Functions and Duties** Total Percentage: 100%

Add Delete Move Up Move Down Paste List **Content Search**

Duties are listed in order of greatest importance. Other responsibilities may be assigned.

| Order of Importance | Function                       | Duties         | % TIME |
|---------------------|--------------------------------|----------------|--------|
| 1                   | Financial Analysis & Reporting | TEST TEST TEST | 70     |
| 2                   | Business Operations Support    | TEST TEST TEST | 30     |

[Add New Row](#) [Manage Rows](#)

**Non-Essential Duties**  
 Add Delete Row Move Up Move Paste List Content Search

Non-essential duties are a peripheral, incidental or minimal part of a job that if removed would not adversely affect the job.

**Other Requirements - Applies to all Positions**

- Performs other duties as assigned
- This job description is not intended to be a complete list of all responsibilities subject to review and change at any time, with or without notice, in accordance with the University's policies and standards.
- Complies with all policies and standards
- Complies with all principles of community at the University of California, Santa Barbara. UCSB is a diverse community comprised of individuals having many perspectives and identities. We come from a multitude of backgrounds and experiences, with distinct needs and goals. We recognize that to create an inclusive and intellectually vibrant community, we must understand and value both our individual differences and our common ground. The UCSB Principles of Community embodies this commitment, and reflects the ideals we seek to achieve.

**5** SAVE your work before continuing on. Previous Next **Save**

3 Make sure %'s add up to 100%.

OPTIONAL: Click on Content Library to search a large database of duty statements related to this JD.

The "Other Requirements" section is not editable and applies to all positions.

## Section 5 - Qualifications

**1** QUALIFICATIONS View Job Posting

After entering data in the Qualifications fields below, SAVE the job description and click on the View Job Posting button to see how the qualifications you entered will appear on the Job Posting for Financial Services Analyst 2 (TBD\_205)

For Reference Only - Education Requirements from CT Job Standard

| Education Level  | Required/Preferred |
|--|--------------------|
| Bachelor's degree in related area and / or equivalent experience / training. | Required           |

If there are any education requirements for this job title, they will be listed here for reference.

**2** Education Requirements for this Position

Add Delete Row Move Up Move Down Paste List Export

List the education requirements for this position.

| Education Level   | Education Details                                      | Required/Preferred | And/Or |
|-------------------|--|--------------------|--------|
| Bachelor's Degree | or equivalent combination of education and experience. | Required           |        |

Manually add/revise education requirements.

Cut and paste from the reference section if applicable.

**2** Work Experience

Add Delete Row Move Up Row Move Down Row Content Search Refresh

List the Experience Requirements for this position.

| Experience | Experience Details | Required/Preferred | And/Or |
|------------|--------------------|--------------------|--------|
| 1-3 years  | TEST TEST TEST     | Preferred          |        |

Click on Content Search to view recommendations for years of experience to require.

Click on Content Search to view recommendations for years of experience to require.

For Reference Only - Knowledge, Skills and Abilities from CT Job Standard

KSAs

- Working knowledge of financial processes, policies and procedures.
- Strong knowledge of financial data management and reporting systems.

The KSAs from the CT Job Standard are here for your reference only. You can copy and paste whatever applies to your unique JD.

**3** Knowledge, Skills and Abilities for this Position

Add Delete Row Move Up Row Move Down Row Paste List Content Search

Copy and paste the Knowledge, Skills and Abilities from above that apply to this job and/or create new KSAs for this position.

KSAs

- Strong organizational skills and unflinching attention to detail and accuracy.

Click on Content Search to view KSAs related this JD.

Right click on a row to copy and paste KSAs to the editable section below -or- add unique KSAs.

## Section 5 - Qualifications (continued)

**Licenses and Certifications**

Add Delete Row Move Up Row Move Down Row Refresh Undo

Required Licenses and Certifications for this position are listed below. Add additional licenses that might apply. Type N/A if not applicable.

| Licenses/Certification Details | Required/Preferred |
|--------------------------------|--------------------|
| N/A                            |                    |

[Add New Row](#) [Manage Rows](#)

**For Reference Only - Legacy KSAs and Other Qualifications**

- Bachelor's degree or equivalent combination of education and experience. - Strong oral and written communication skills and accuracy. - Exceptional verbal and interpersonal skills that foster positive relationships. - Proficiency in Microsoft Word, Excel, PowerPoint, Internet and e-mail and demonstrate the ability to manage multiple programs and application portals. - Ability to work independently. - Ability to maintain strong working relationships with internal and external stakeholders. - Ability to prioritize duties and achieve planned goals for a large and busy unit. - Ability to work under pressure. - Ability to effectively solve problems and demonstrate sound reasoning and judgment. - Ability to establish and maintain effective working relationships within the division of Institutional Advancement, the Development Office and with the broader campus community. - Ability to interpret policies and procedures and accurately communicate them to others. - Prior experience in using databases including Access. - Prior experience with financial programs a must.

**SAVE your work before continuing on.**

[Previous](#) [Next](#) [Save](#)

**4** Add license(s) and certifications that you require for this position.

The legacy section contains the information imported from OACIS that needs to be copied and pasted into the proper sections on this page.

## Section 6 - Competencies

**COMPETENCIES**

**UC Core Competencies**  
The core competencies below apply to all UC staff employees, regardless of location, level, or position. They are essential to the mission, vision and values of the University and its locations.

Achieving Results through Continuous Improvement  
Strives for high-quality performance in self and the organization. Takes initiative to improve products, services or processes to deliver optimum results. Is resourceful, seeks alternatives and broad input; measures outcomes.

Achieving Results through Continuous Learning  
Demonstrates responsibility and ownership for one's job and career path by identifying skillsets needed to perform successfully on the job. Consistently works to learn and open to feedback.

**Functional Competencies**

Identify the Functional/Technical Competencies that a person must have in order to be successful in this role. These are the UC Core Competencies.

| Competency           | Level     | Competency Description   |
|----------------------|-----------|--|
| Analytical Thinking  | 2. Novice | Practices investigative techniques to determine the best approach.   |
| Functional Knowledge | 1. Entry  | Knowledgeable about his/her specific job.                            |
| Collaboration        | 2. Novice | Creates internal alliances outside the immediate team or department. |

**Interview Questions**  
Below are suggested interview questions associated with the Functional Competencies selected above. These questions can be rated on a 1-5 scale if desired.

| Competency           | Level     | Interview Question   | Rating |
|----------------------|-----------|--|--------|
| Analytical Thinking  | 2. Novice | How do you determine the best process for handling a new task? | 5      |
| Functional Knowledge | 1. Entry  | How do you gain the knowledge to do your job?                  | 5      |

**Annotations:**

- 1:** Click here to open the Functional Competency chart.
- 2:** UC Core Competencies are not editable and apply to all staff positions. Click on each box that applies to add functional competencies and interview questions.
- 3:** SAVE your work before continuing on.

**Modal Window:**

Save and Close

Competency Name

Clear Selected Show Selected Items: 5

| Competency Title    | 1. Entry  | 2. Novice  |
|---------------------|---|--|
| Analytical Thinking | Uses basic logic and common sense to arrive at solutions. | Practices investigative techniques to determine the best approach.   |
| Business Impact     | Role has impact on the department.                        | Responsible for the team and objectives.                             |
| Collaboration       | Develops partnerships with internal team members.         | Creates internal alliances outside the immediate team or department. |

## Section 7 - Classification Factors

This section is required for ALL job description actions.

### 1 Freedom To Act

Select a statement that describes the level of independence for this position.

- Work is closely managed and reviewed for accuracy and adequacy. Follows specific, outlined and detailed directions.

### 2 Problem Complexity and Problem Solving Timeframes

Select a statement to describe how clearly a problem is defined when presented and how much a person must understand the nature of the problem. Additionally reflects typical timeframes associated with resolving problems.

- Provides resolution to problems that are readily identifiable with limited scope and complexity in accordance with standard practices, procedures, applications or routines. Problem timeframe: The majority of tasks typically take one to two days to resolve.

### 3 Impact

Select a statement that describes the impact to the organization of contributions, decisions, recommendations or actions by the incumbent.

- Failure to accomplish results can normally be overcome without significant effect on the organization.

### 4 Contact with Others

Select a statement that describes the level, structure (internal and/or external) and nature of interface the role possesses.

- Contacts are primarily with direct supervisor and others in group or department to give and receive information.

For each of these classification factors, select the statement the best describes your expectation of this position.

## Section 7 - Classification Factors (continued)

**1** **Financial Responsibilities**  
 Complete this section if the position has any financial responsibility.

**2** **Financial Controls**

This position has responsibility for setting up and maintaining financial control systems and standards for the department

This position has authority to approve small, moderate, or significant financial expenses

This position has authority to delegate staff roles and responsibilities in campus business and financial

For any financial figures being reported, base it on the previous fiscal year.

Small  
Moderate  
Significant

**3** **Budgetary Responsibilities (previous fiscal year)**  
 Complete this section if the position is responsible for overseeing or managing the day-to-day financial operations of a unit, department, or division.

| Financial Category  | Scope of Budgetary Responsibility | Approximate Annual Value | Other Information and Comments |
|---|-----------------------------------|--------------------------|--------------------------------|
| <input checked="" type="checkbox"/> Annual Expenditures     | Department                        | \$12,500,000             | test test test                 |
| <input type="checkbox"/> Generated Income                   |                                   |                          |                                |
| <input type="checkbox"/> Gifts                              |                                   |                          |                                |
| <input type="checkbox"/> Endowments                         |                                   |                          |                                |
| <input checked="" type="checkbox"/> Special Program Funding | Program                           | \$75,000                 | test test test                 |
| <input type="checkbox"/> Faculty Start-Up Funding           |                                   |                          |                                |
| <input type="checkbox"/> Other                              |                                   |                          |                                |

Check each box that applies and fill out the corresponding scope, value, and other information.

## Section 7 - Classification Factors (continued)

For any financial figures being reported, base it on the previous fiscal year.

### Contracts and Grants (previous fiscal year)

Complete this section if the position is responsible for overseeing or administering Contracts and Grants.

4

| Type of Responsibility   | Approximate Number | Approximate Annual Value | Other Information and Comments (i.e. Granting Agency name, complexity of grant) |
|--|--------------------|--------------------------|---|
| <input checked="" type="checkbox"/> Proposals Prepared and Submitted                               | 6                  | \$17,500,000             | test test test  |
| <input checked="" type="checkbox"/> Grants Awarded (Post-Award Admin: Set Up, Manage, Close-<br>.. | 4                  | \$9,500,000              | test test test  |

Check the boxes that apply and fill out the corresponding fields.

5

### Other Financial Information

test test test

Indicate here any other important financial responsibilities that might apply to this position.

SAVE your work before continuing on.

Previous

Next

Save

## Section 8 - PEMs (Physical, Environmental, and Mental Requirements)

### PHYSICAL, ENVIRONMENTAL, AND MENTAL (PEM) REQUIREMENTS

A thorough completion of this section is needed for compliance with legal standards such as the Americans with Disabilities Act to enable individuals with disabilities to perform the essential functions of the job.

Go through and answer all the Physical, Environmental, and Mental Requirements (PEMs) for this position, including whether or not it is essential to the job.

#### Physical Requirements

Reset to Default    Undo

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

| Physical Requirements | Never<br>0 Hours      | Occasional<br>Up to 3 Hours      | Frequent<br>3 to 6 Hours         | Continuous<br>6 to 8+ Hours | Is Essential                        |
|-----------------------|-----------------------|----------------------------------|----------------------------------|-----------------------------|-------------------------------------|
| Standing              | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/>       | <input checked="" type="checkbox"/> |
| Walking               | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/>       | <input checked="" type="checkbox"/> |
| Sitting               | <input type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>       | <input checked="" type="checkbox"/> |

#### Other Physical Requirements

If "Body Positions Other" or "Climbing Other" were selected above, please explain:

test test test

#### Environmental Requirements

Reset to Default    Undo

The environmental requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

| Exposures                     | Never<br>0 Hours                 | Occasional<br>Up to 3 Hours | Frequent<br>3 to 6 Hours | Continuous<br>6 to 8+ Hours | Is Essential             |
|-------------------------------|----------------------------------|-----------------------------|--------------------------|-----------------------------|--------------------------|
| Background noise              | <input checked="" type="radio"/> | <input type="radio"/>       | <input type="radio"/>    | <input type="radio"/>       | <input type="checkbox"/> |
| Chemicals or toxic substances | <input checked="" type="radio"/> | <input type="radio"/>       | <input type="radio"/>    | <input type="radio"/>       | <input type="checkbox"/> |
| Combative patients            | <input checked="" type="radio"/> | <input type="radio"/>       | <input type="radio"/>    | <input type="radio"/>       | <input type="checkbox"/> |

## Section 8 - PEMs (Physical, Environmental, and Mental Requirements)

**4 Blood/Fluid Exposure Risk**

Indicate any blood/fluid exposure risk for the position.

Category 1: Tasks involve exposure to blood, fluids or tissue.

Category 2: Usual tasks do not involve exposure to blood, fluids or tissues but job may require performing unplanned Category 1 tasks.

Category 3: Tasks involve no exposure to blood, body fluids or tissues. Category 1 tasks are not a condition of employment.

**5 Mental Requirements**

Reset to Default Undo

The mental requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Indicate the Mental Requirements for the position.

| Exposures            | Never<br>0 Hours      | Occasional<br>Up to 3 Hours      | Frequent<br>3 to 6 Hours | Continuous<br>6 to 8+ Hours | Is Essential                        |
|----------------------|-----------------------|----------------------------------|--------------------------|-----------------------------|-------------------------------------|
| Oral communication   | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/>    | <input type="radio"/>       | <input checked="" type="checkbox"/> |
| Perform calculations | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/>    | <input type="radio"/>       | <input checked="" type="checkbox"/> |
| Read/Comprehend      | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/>    | <input type="radio"/>       | <input checked="" type="checkbox"/> |

**6 Travel Requirements**

Estimated Amount

5% test test test

Brief Description

Select an approximate % of time from the drop-down list.

SAVE your work before continuing on.

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## Section 9 - Conditions of Employment

**SPECIAL CONDITIONS OF EMPLOYMENT AND REPORTING REQUIREMENTS**

**Essential Elements of Critical Positions**

1 Check all that apply:

- Master key access to University-owned residence and/or other facilities
- Direct responsibility for the care, safety and security of humans or animals; or the safety and security of personal or University property
- Direct access to, or responsibility for, cash and cash equivalents or University property disbursements or receipts
- Direct access to, or responsibility for, controlled substances or hazardous materials
- Extensive authority for committing the financial resources of the University
- Responsibility for operating commercial vehicles, machinery or toxic systems that could cause accidental death, injury or health problems
- A requirement for a professional license, certification or degree, the absence of which would expose the University to legal liability and/or adverse public reaction
- Direct access to, and/or responsibility for, information affecting national security
- Direct access to, and/or responsibility for, protected, personal, or other sensitive data
- N/A

If none of the above applies, click N/A.

## Section 9 - Special Conditions of Employment (continued)

**2** **Reporting and Background Check Requirements**

Check all that apply:

- Criminal history check (U02): Satisfactory completion of a criminal history background check
- CANRA (U13): Mandated Child Abuse Reporter
- Clery Act (U15): Campus Security Authority
- Credentials Verification (U06): For clinical practitioner
- Driver's License (U08): Must maintain valid CA DL, a clean DMV record and enrollment in DMV
- Form 700 (U16): Statement of Economic Interest Filer
- Works in patient care environment
- N/A

If none of the above applies, click N/A.

If any of the Essential Elements of a Critical Position where checked in the above section, you will be required to require a Criminal History Background check.

**3** **Other Special Conditions of Employment**

Other special conditions of employment that apply to this position: May be called upon to work occasional evenings and weekends at various Development Office, Institutional Advancement or campus-wide events.

SAVE your work before continuing on.

Previous Next **Save**

## Section 10 - Action Justification

### ACTION JUSTIFICATION

1

Submitters Name

Name of Submitter here

Submitters Phone

x5555 or cell 805-555-5555

Enter the name of person submitting the action and the best phone number to reach them.

Compensation Reviewer Assigned

Andrea Dittman

This helps HR prioritize the action.

Is this action being performed for the purpose of recruitment?

Yes

Is this a Temporary Assignment/Stipend Action? If Yes, skip the remainder of this section.

No

2

**FOR ALL ACTIONS:** Please explain the basis for submitting this job description for review. Include any helpful information such as background and context.

test test test

Complete each question so that HR/Comp has a clear picture of why you're submitting this action.

**FOR ALL ACTIONS:** Explain how the new duties evolved. For instance, are they new to the department? Were they previously done by another employee? Are they an expansion of the employee's current duties? Enter N/A if question not applicable.

test test test

**FOR ALL ACTIONS:** If duties have been removed or redelegated, please explain.

test test test

## Section 10 - Action Justification

3

FOR RECLASS ACTIONS: Are the new duties currently being performed by the employee? N/A

FOR RECLASS ACTIONS: Do a majority of the duties (more than 50%) align with a different or higher classification level? N/A

FOR RECLASS ACTIONS: If scope, complexity, percent of time or frequency has changed, but the duties are essentially unchanged, explain

test test test

FOR ALL ACTIONS: Other comments to Compensation.

test test test

4

### Attachments

Please attach the following:

- Current or proposed Organizational Chart (if you're requesting a reclassification or new position)
- Divisional approval form (if applicable)
- Other documentation to support your request.

Document Name:

[Upload...](#) [Download...](#) [Delete Document](#) [Refresh](#)

SAVE your work before continuing on.

[Previous](#) [Next](#) [Save](#)

Complete each question so that HR/Comp has a clear picture of why you're submitting this action.

# Section 11 - Temporary Assignment/Stipend

If the answer to this question was YES on the Action Justification section, then the following questions will appear on the Temporary Assignment/Stipend section.

Is this a Temporary Assignment/Stipend Action? If Yes, skip the remainder of this section. Yes

## TEMPORARY ASSIGNMENT/STIPEND

Skip this section unless you're adding temporary duties. Section will be blank if you answered No to the Temporary Assignment question in the previous section.

1

|                                     |            |     |
|-------------------------------------|------------|-----|
| Begin Date of Temp Assignment       | 11/1/2021  | ... |
| End Date of Temp Assignment         | 11/30/2021 | ... |
| Revised End Date of Temp Assignment |            | ... |

Indicate the begin and end dates of the temporary assignment.

Briefly describe the basis for this temporary assignment.

test test test

Provide a detailed description of the duties and responsibilities to be performed on a temporary basis.

test test test

2  
Complete all the questions on the Temporary Assignment section.

% of time to be spent on temporary duties.

## Section 11 - Temporary Assignment/Stipend (continued)

Are the temporary duties classifiable at a higher level or are they at the same level but significantly different than what the employee normally performs? Please explain.

test test test

In addition to the temporary duties, will the employee continue to perform all of their regular duties? Please explain.

test test test

If No, what duties will be temporarily suspended or re-assigned?

test test test

Additional information to support the need for a temporary stipend.

test test test

**3**  
Complete all the questions on the Temporary Assignment section so that HR/Compensation can properly assess eligibility for a stipend.

SAVE your work before continuing on.

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## Section 12 - Compensation Information

### COMPENSATION INFORMATION

Skip this section unless you're proposing a reclass increase or temporary stipend.

#### Salary Info For Reclass And Temporary Stipend Actions

|  |  |
|--|--|
| Current Salary/Pay Rate  | <input type="text" value="\$28.50"/>             |
| Effective Date of Current Salary/Pay Rate  | <input type="text" value="6/27/2021"/> ...       |
| Proposed percentage increase (i.e. 5, 10, 15)  | <input type="text" value="10"/>                  |
| Proposed New Salary/Pay Rate (reclasses only)  | <input type="text" value="\$31.35"/>             |
| Proposed New Step/Grade (reclasses only)   | <input type="text" value="19"/>                  |
| Proposed stipend amount  | <input type="text" value="\$0.00"/>              |
| Have you considered the impact of the above salary increase on other employees in your department? | <input type="text" value="Yes"/> ▾               |
| Fund Source Information  | <input type="text" value="19900 general funds"/> |
| HR Approved percentage increase  | <input type="text" value="0"/>                   |
| HR Approved new salary (reclasses only)  | <input type="text" value="\$0.00"/>              |
| HR Approved Stipend Amount   | <input type="text" value="\$0"/>                 |

Submitter Comments    test test test

1

If you're proposing a reclass or stipend, complete the fields in these sections.

Once HR has reviewed and approved the action, the final approved increase and salary will be reflected here.

## Section 12 - Compensation Information (continued)

### Grade And Salary Range Info

|                       |          |
|-----------------------|----------|
| Salary Plan           | CTSB     |
| Grade                 | Grade 19 |
| Hourly Range Min      | \$24.62  |
| Hourly Range Midpoint | \$33.00  |
| Hourly Range Max      | \$41.33  |
| Annual Range Min      | \$51,400 |
| Annual Range Midpoint | \$68,900 |
| Annual Range Max      | \$86,300 |

The Grade and Salary Range Info section is for reference only.

SAVE your work before continuing on.

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## Section 13 - Workflow Approvals

### WORKFLOW APPROVALS

#### Approvals

| Step Name                               | Step Approver  | Approval Date | Step Status |
|---|----------------|---------------|-------------|
| 1. Department Initiates Action (Active) | Lisa Romero    | [N/A]         | NotStarted  |
| 2. HR/Comp Reviews                      | Andrea Dittman | [N/A]         | NotStarted  |

#### Reviewer Comments

The Workflow Approvals section is for reference only and contains the latest information about the stage of progress of the JD action and who's involved.

SAVE your work before continuing on.

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## Section 14 - Job Posting

### JOB POSTING

Payroll Title: FINANCIAL SVC ANL 2 (004627)  
Working Title: TEST Job 3 for Training  
UC Job Code: 004627  
Position ID: TBD\_205  
Job Open Date:  
Application Review Begins:  
Department Name: PERS HUMAN RESOURCES  
Percentage of Time: 100  
Union Code: 99 - Non-Represented  
Classified Indicator: PSS  
Grade: Grade 19  
FLSA Status: Non-Exempt  
Work Location: SAASB 3101 L  
Hiring Range:  
Working Days and Hours: M-F; 7:30am - 4:30pm  
Benefits Eligibility:  
Eligible for Remote Work: Yes  
Type of Remote Work Arrangement: Hybrid (Both UC & Non-UC locations)

**Department Marketing Statement**  
test test test

Scroll down to see the full Job Posting template. Copy this section and paste into TAM job posting section.

You will have to manually fill out the fields underlined once in the TAM editing window.

The Job Posting template auto-populates with information from several of the workflow sections.

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## Section 14 - Job Posting (continued)

### JOB POSTING

#### Qualifications Section of Job Posting

##### **Knowledge, Skills, and Abilities**

- Strong organizational skills and unfailing attention to detail and accuracy.
- Exceptional verbal and interpersonal skills that foster positive relationships with diverse populations.
- Excellent computer skills including proficiency in Word, Excel, PowerPoint, Internet and e-mail and demonstrated ability to quickly learn various software programs and application portals.

##### **Education**

- Bachelor's Degree or equivalent combination of education and experience. Required

##### **Work Experience**

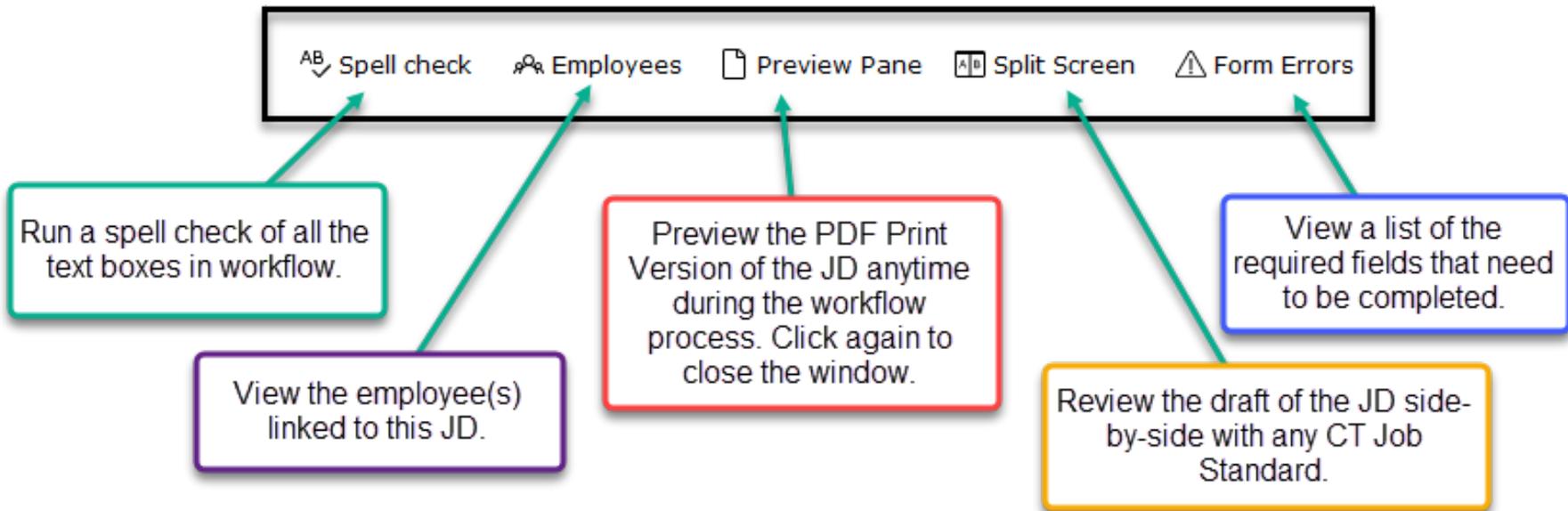
- 1-3 years TEST TEST TEST Preferred

##### **Licensure Requirements**

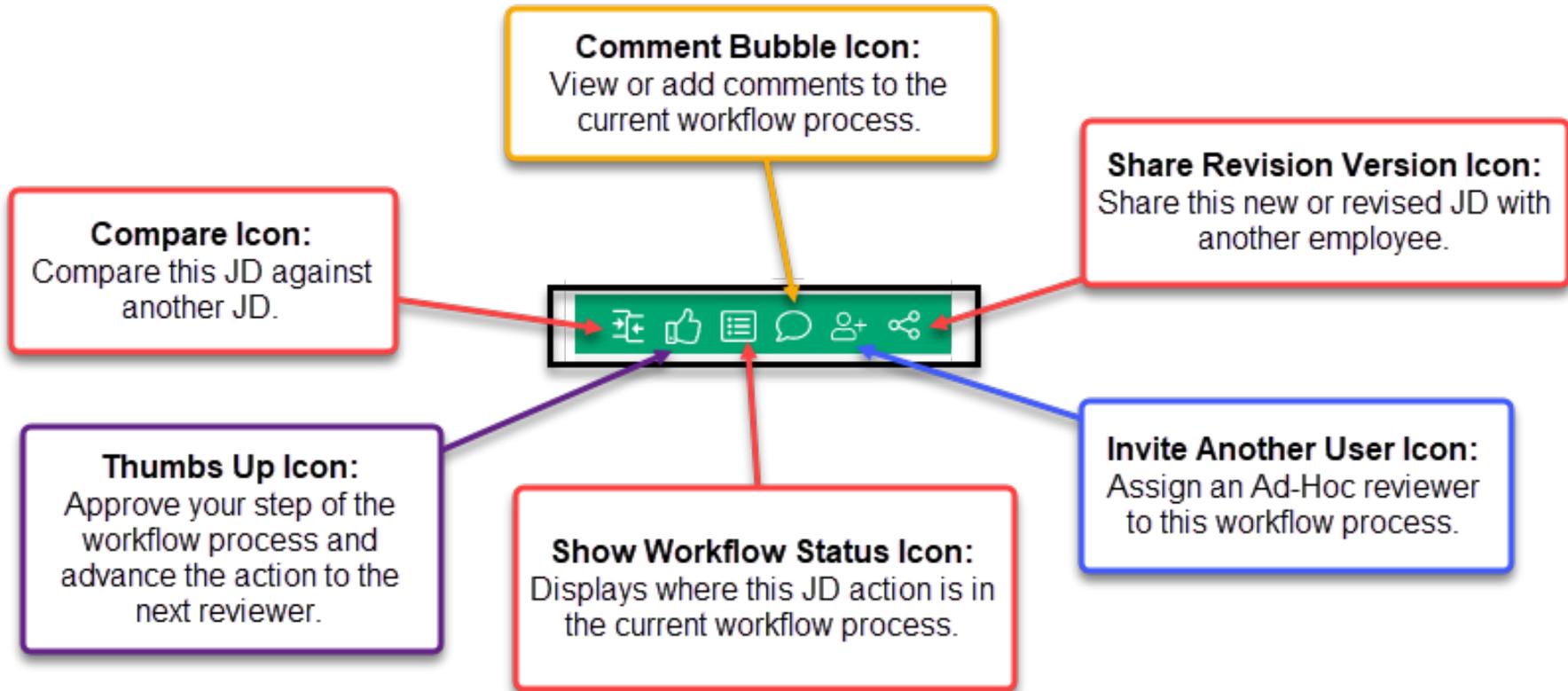
- N/A

The Qualifications section in the Job Posting will have to be manually rearranged and edited into Minimum and Preferred Requirements for the TAM job posting.

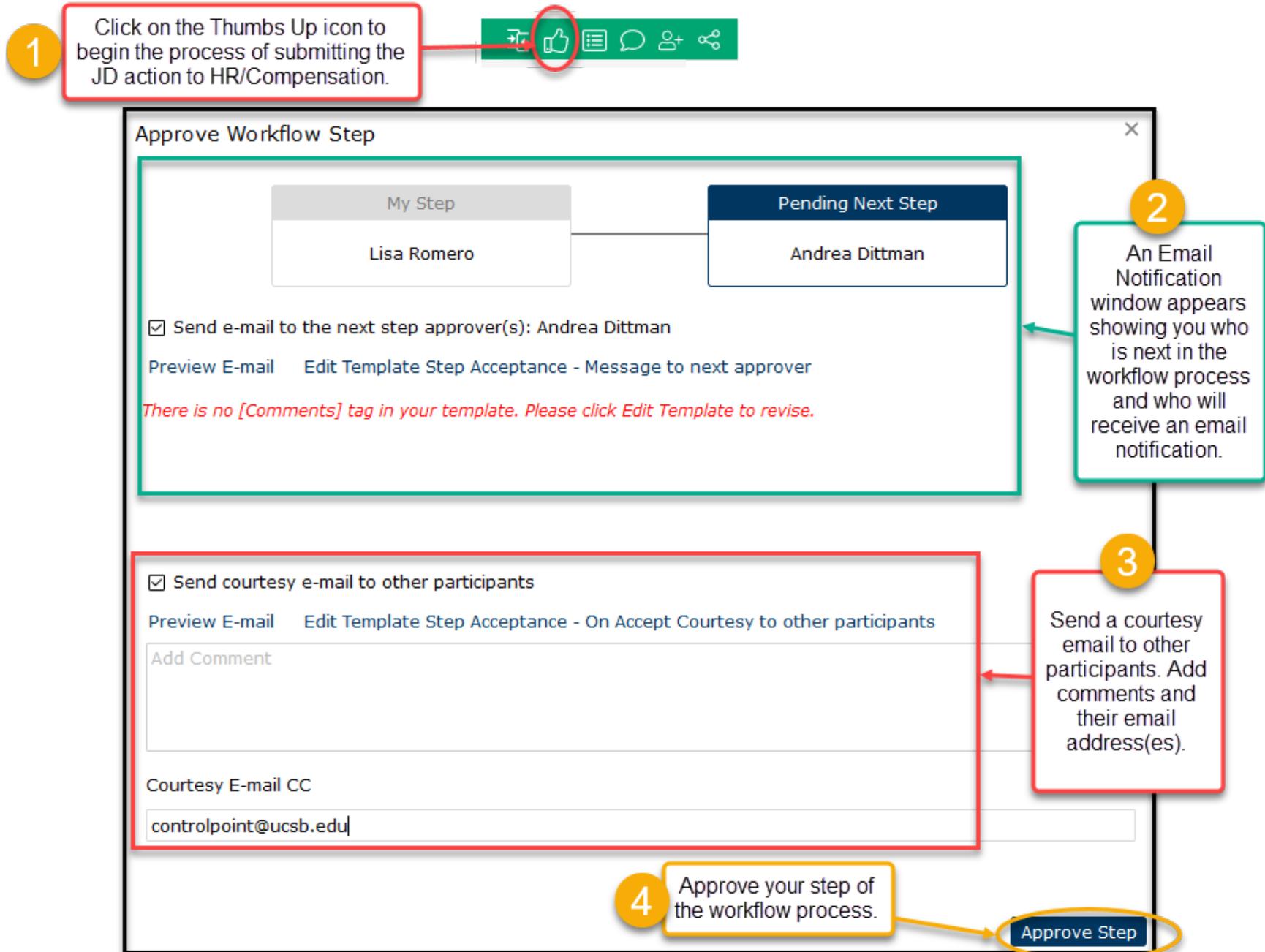
## Workflow Screen Options



## Green Workflow Tool Bar



# Submitting a Job Description to HR/Compensation



*Coming Soon:*

Archiving a Job Description

Employee Acknowledgement Process

Email Notifications