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

<table>
<thead>
<tr>
<th>Action</th>
<th>Department</th>
<th>Emplid</th>
<th>Position ID</th>
<th>Employee Name</th>
<th>UC Job Code</th>
<th>UC Payroll Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PERS_HUMAN RESOURCES</td>
<td>40031426</td>
<td></td>
<td></td>
<td>007395</td>
<td>PROJECT POLICY ANL SUPV (007395)</td>
</tr>
<tr>
<td></td>
<td>PERS_HUMAN RESOURCES</td>
<td>40077113</td>
<td></td>
<td></td>
<td>007719</td>
<td>BENEFITS ANL 2 (007719)</td>
</tr>
<tr>
<td></td>
<td>PERS_HUMAN RESOURCES</td>
<td>40066604</td>
<td></td>
<td></td>
<td>000495</td>
<td>LABOR REL REPR 4 (000495)</td>
</tr>
<tr>
<td></td>
<td>PERS_HUMAN RESOURCES</td>
<td>40030406</td>
<td></td>
<td></td>
<td>000621</td>
<td>EMPLOYMENT MGR 1 (000621)</td>
</tr>
<tr>
<td></td>
<td>PERS_HUMAN RESOURCES</td>
<td>40036352</td>
<td></td>
<td></td>
<td>007721</td>
<td>BENEFITS ANL 4 (007721)</td>
</tr>
<tr>
<td></td>
<td>PERS_HUMAN RESOURCES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Narrow your search using the open text search.**
- **Narrow your search using the smart search drop-down filters.**
- **Click OFF to see all direct AND indirect reports.**
- **Scroll down to see more rows.**
- **Scroll right to see more columns.**
- **Single click on any row then click here to view the employee(s) JD in Form View.**
- **Single click on any row then click here to view details about this employee.**
- **View an org chart of all the jobs that report to you.**
- **Export an Excel version of the grid.**
1. The Job Library lists all the job descriptions in your assigned departments.
Job Library (continued)

1. Click on the carrot to open another menu.

2. Preview the JD for the row you highlighted.

3. 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
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 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 status of all JD actions in workflow will be listed here.
CT Job Standards Matrix

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

<table>
<thead>
<tr>
<th>Grade</th>
<th>Academic Human Resources</th>
<th>Benefits</th>
<th>Benefits Pr</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade 30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade 28</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade 27</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade 25</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade 24</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade 23</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade 22</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grade 21</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click on the carrot to open the vertical Job Family list.

Click on a Job Family to narrow your search of job codes appearing in the matrix.

Hover over the carrots to view the Job Families as they scroll left and right.

Double click on a job title to open a printable version of the job standard.
CT Job Standards

1. View or download the CT Job Standards.
# CT Job Standards (continued)

## Side-By-Side View

- **Reset**
- **Export as Excel**
- **Edit Profiles**

### Export this grid to Excel.

### Click on the 'x' to hide title columns you don't need to see.

### 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.

<table>
<thead>
<tr>
<th>Classified Indicator Desc (Pers Prog)</th>
<th>Compensation Analyst 1</th>
<th>Compensation Analyst 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PSS</td>
<td>PSS</td>
</tr>
<tr>
<td></td>
<td>Entry</td>
<td>Intermediate</td>
</tr>
<tr>
<td></td>
<td>Grade 20</td>
<td>Grade 21</td>
</tr>
<tr>
<td></td>
<td>Non-Exempt</td>
<td>Non-Exempt</td>
</tr>
</tbody>
</table>

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.

1. Click on Blank Job to use a CT Job Standard to pre-fill your JD.
2. Enter in a Working/Business title.
3. Select a template CT job standard to populate the new JD. See next few pages for instructions.
4. A 2 or 3 step workflow will automatically be assigned based on your user role (Preparers have 3 steps, Submitters have 2 steps.)
5. Click here to assign an HR/Comp Reviewer. See next few pages for instructions.
6. Click here to officially start the Workflow process.
Add a New JD from a Blank Job (continued)

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

1. Type in the job title or job code that you want.
2. Click once to highlight the row you want.
3. List of CT Job Standards to choose from.
4. Click the 3-dot menu to bring up a list of CT job standard templates to choose from.
5. Save and Close
6. Select Parent for the new Job Description
7. Job Standard
8. Parent/Child Settings File
9. UCSB Master Template
10. Select Job Standard for TEST Job
11. Search compensation
12. Advanced
13. Same Job Family Only
14. Save Job Standard
15. Side-By-Side
Add a New JD from a **Blank Job** (continued)

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

---

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

2. **Search Content Library**
   - Use the smart filters to search for an existing JD by job family or function.
   - Search for an existing JD by typing in the position ID, job code, or payroll title name.
Add a New JD from a **Base Job** (continued)

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

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

**"Company Jobs" is another name for UCSB jobs.**

**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.**

**Save and Close**
Add a New JD from a **Base Job** (continued)

1. **Position ID:** Enter a temporary number assigned to the JD until you request a Position ID.
2. **New Job Title:** Enter the unique Working/Business Title for your JD.
3. **Unique Job Name:** Input the Financial Services Analyst 2 (TBD_205) name.
4. **Job Standard:** This is the CT job standard that will auto-populate your JD, in addition to the other fields that will be copied over.
5. **Select Workflow:** Choose the workflow that automatically assigns 2 or 3 steps based on your user role (Preparers have 3 steps, Submitters have 2 steps).

---

**Department Initiates Action:**
- Lisa Romero

**HR/Comp Reviews:**
- Andrea Dittman

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**Job Revision Workflow(s):**
- **Financial Services Analyst 2 (TBD_205):** Revision was started.

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**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.
Revise a JD (Update, Reclass, Stipend) (continued)

----> 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.
- Scroll down to complete all parts of the section.
- Use the drop down to select the type of action you're requesting (i.e. Create New JD, Update, Reclass, etc.).
- Click here to assign the correct dept for this JD.
- Always save your work before moving to the next section in workflow.
- Click the Edit button to begin editing this JD.
### Position Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position ID</td>
<td>TBD_205</td>
</tr>
<tr>
<td>UC Payroll Title</td>
<td>FINANCIAL SVC ANL 2 (004627)</td>
</tr>
<tr>
<td>UC Job Code</td>
<td>004627</td>
</tr>
<tr>
<td>System Title</td>
<td>Financial Services Analyst 2 (TBD_205)</td>
</tr>
<tr>
<td>Working/Business Title</td>
<td>TEST Job 3 for Training</td>
</tr>
<tr>
<td>CT Job Family</td>
<td>Finance</td>
</tr>
<tr>
<td>CT Job Function</td>
<td>Financial Services</td>
</tr>
<tr>
<td>Classified Indicator Descr (Pers Prog)</td>
<td>PSS</td>
</tr>
<tr>
<td>Salary Grade</td>
<td>Grade 19</td>
</tr>
<tr>
<td>FLSA Status</td>
<td>Non-Exempt</td>
</tr>
<tr>
<td>FLSA Override</td>
<td></td>
</tr>
<tr>
<td>Employee Class (Appt Type)</td>
<td>2 - Staff: Career</td>
</tr>
<tr>
<td>Rehired Retiree?</td>
<td>No</td>
</tr>
<tr>
<td>Union Code (Collective Bargaining Unit)</td>
<td>99 - Non-Represented (PPSM)</td>
</tr>
<tr>
<td>ERC (Empl Rel Code)</td>
<td>E-All Others - Not Confidential</td>
</tr>
<tr>
<td>% of Time (not FTE)</td>
<td>100</td>
</tr>
<tr>
<td>Working Days and Hours</td>
<td>M-F; 7:30am - 4:30pm</td>
</tr>
</tbody>
</table>

**Click or hover over the help bubbles for more information.**

**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

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.

One or more errors were detected.

<table>
<thead>
<tr>
<th>Tab Page</th>
<th>Element/Field</th>
<th>Error Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Details</td>
<td>Action Requested:</td>
<td>Action Requested:</td>
</tr>
<tr>
<td>Supervision</td>
<td>Supervisor's Payroll Title:</td>
<td>Supervisor's Payroll</td>
</tr>
<tr>
<td>Qualifications</td>
<td>Work Experience</td>
<td>Work Experience</td>
</tr>
<tr>
<td>PEM Requirements</td>
<td>Physical Requirements</td>
<td>Physical Requirements</td>
</tr>
</tbody>
</table>

If you missed any required fields they would be listed here, in order by section.
Section 2 - Supervision

**SUPERVISION**

- **Name of Supervisor:** Kathy Moore
- **Supervisor’s Payroll Title:** Compensation Manager 1
- **Name of Department Head:** Vacant (TBD)

1. **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

2. Select the level of supervision received.

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Payroll Title</th>
<th>% of Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Doe</td>
<td>Compensation Analyst 3</td>
<td>100</td>
</tr>
<tr>
<td>Jane Smith</td>
<td>Compensation Analyst 3</td>
<td>100</td>
</tr>
</tbody>
</table>

4. **Legacy Names and Payroll Titles of Career Employees Supervised**
   - This legacy section contains information imported from OACIS that needs to be copied and pasted into the proper sections on this page.

   - N/A

5. **Other Positions Supervised (limited, contracts, and students)**
   - Enter other non-career positions supervised.

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

   **SAVE your work before continuing on.**
Section 3 - Job Summary

General Summary of Job Duties and Responsibilities

Financial & Business Operations Analyst Under the general direction of the Associate Business Manager, this position is a key role in the efficient functioning of the Business and Financial unit for the Division of Institutional Advancement (Division of Institutional Advancement). The primary responsibilities include performing a variety of operational, personnel, and financial tasks, such as managing supplies, processing expenses, and providing timely, accurate reports and summaries. The Analyst works closely with the Associate Business Manager and the entire Business & Financial Operations team to ensure the department operates smoothly.

CT Job Function Summary

Involves the processing and servicing of a variety of operational, personnel, and financial tasks. Responsibilities may include handling payroll, accounts receivable, accounts payable, purchasing, recharge billing, travel and entertainment, collection and data entry, analysis, review and control, customer servicing, and reporting.

CT Generic Scope Description

Professional who applies acquired job skills to complete assignments. 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.
### Essential Functions and Duties

<table>
<thead>
<tr>
<th>Order of Importance</th>
<th>Function</th>
<th>Duties</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Financial Analysis &amp; Reporting</td>
<td>TEST TEST TEST</td>
</tr>
<tr>
<td>2</td>
<td>Business Operations Support</td>
<td>TEST TEST TEST</td>
</tr>
</tbody>
</table>

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

#### Non-Essential Duties

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

### 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 policies and standards of the University of California, Santa Barbara.
- Complies with all policies and standards.

The University of California, Santa Barbara 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.

**SAVE your work before continuing on.**
Section 5 - Qualifications

1. Manually add/revise education requirements.

2. Add work experience that you require for this position.

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

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

Cut and paste from the reference section if applicable.

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

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

Click on Content Search to view KSAs related to this JD.
Section 5 - Qualifications (continued)

Licenses and Certifications

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

For Reference Only - Legacy KSAs and Other Qualifications

- Bachelor’s degree or equivalent combination of education and experience. - Strong oral and written communication skills. - Exceptional verbal and interpersonal skills that foster positive relationships with individuals at all levels. - Computer proficiency skills including proficiency in Word, Excel, PowerPoint, Internet and e-mail. - Ability to work independently. - Ability to maintain strict confidentiality. - Ability to prioritize duties and achieve planned goals for a large and busy unit. - Ability to effectively solve problems and demonstrate sound reasoning and judgment. - Ability to establish and maintain cooperative 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.
Section 6 - Competencies

UC Core Competencies:
- Achieving Results through Continuous Improvement
- Achieving Results through Continuous Learning

The core competencies below apply to all UC staff employees, regardless of location, level within the mission, vision and values of the University and its locations.

Demonstrates responsibility and ownership for one's job and career path by identifying skillsets needed to perform successfully in the job. Consistently works to learn and ask for feedback.

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.

SAVE your work before continuing on.
Section 7 - Classification Factors

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 autonomy one has in 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, 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 made by the incumbent.

- [ ] Failure to accomplish results can normally be overcome without significant effects.

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.
### Financial Responsibilities

Complete this section if the position has any financial responsibility.

#### Financial Controls

- [ ] This position has responsibility for setting up and maintaining financial control systems and standards for the department
- [x] 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 operations

#### 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.

<table>
<thead>
<tr>
<th>Financial Category</th>
<th>Scope of Budgetary Responsibility</th>
<th>Approximate Annual Value</th>
<th>Other Information and Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>[x] Annual Expenditures</td>
<td>Department</td>
<td>$12,500,000</td>
<td>test test test</td>
</tr>
<tr>
<td>[ ] Generated Income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>[ ] Gifts</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>[ ] Endowments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>[x] Special Program Funding</td>
<td>Program</td>
<td>$75,000</td>
<td>test test test</td>
</tr>
<tr>
<td>[ ] Faculty Start-Up Funding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>[ ] Other</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Check each box that applies and fill out the corresponding scope, value, and other information.
### Section 7 - Classification Factors (continued)

#### Contracts and Grants (previous fiscal year)

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

<table>
<thead>
<tr>
<th>Type of Responsibility</th>
<th>Approximate Number</th>
<th>Approximate Annual Value</th>
<th>Other Information and Comments (i.e. Granting Agency name, complexity of grant)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposals Prepared and Submitted</td>
<td>5</td>
<td>$17,500,000</td>
<td>test test test</td>
</tr>
<tr>
<td>Grants Awarded (Post-Award Admin: Set Up, Manage, Close-)</td>
<td>4</td>
<td>$9,500,000</td>
<td>test test test</td>
</tr>
</tbody>
</table>

#### Other Financial Information

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

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

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

- **SAVE** your work before continuing on.
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 American's with Disabilities Act. Modifications may be made to enable individuals with disabilities to perform the essential functions of the job.

1. Physical Requirements

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.

<table>
<thead>
<tr>
<th>Physical Requirements</th>
<th>Never 0 Hours</th>
<th>Occasional Up to 3 Hours</th>
<th>Frequent 3 to 6 Hours</th>
<th>Continuous 6 to 8+ Hours</th>
<th>Is Essential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standing</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>✗</td>
</tr>
<tr>
<td>Walking</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>✗</td>
</tr>
<tr>
<td>Sitting</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>✗</td>
</tr>
</tbody>
</table>

2. Other Physical Requirements

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

test test test

3. Environmental Requirements

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.

<table>
<thead>
<tr>
<th>Exposures</th>
<th>Never 0 Hours</th>
<th>Occasional Up to 3 Hours</th>
<th>Frequent 3 to 6 Hours</th>
<th>Continuous 6 to 8+ Hours</th>
<th>Is Essential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Background noise</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td></td>
</tr>
<tr>
<td>Chemicals or toxic substances</td>
<td>●</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td></td>
</tr>
<tr>
<td>Combative patients</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td></td>
</tr>
</tbody>
</table>
Section 8 - PEMs (Physical, Environmental, and Mental Requirements)

**Blood/Fluid Exposure Risk**
- 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.

**Mental Requirements**
Indicate the Mental Requirements for the position.

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.

<table>
<thead>
<tr>
<th>Exposures</th>
<th>Never 0 Hours</th>
<th>Occasional Up to 3 Hours</th>
<th>Frequent 3 to 6 Hours</th>
<th>Continuous 6 to 8+ Hours</th>
<th>Is Essential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oral communication</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perform calculations</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Read/Comprehend</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Estimated Amount</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>5%</td>
<td>test test test</td>
</tr>
</tbody>
</table>
### Special Conditions of Employment and Reporting Requirements

#### Essential Elements of Critical Positions

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

If none of the above applies, click N/A.
Section 9 - Special Conditions of Employment (continued)

### Reporting and Background Check Requirements

<table>
<thead>
<tr>
<th>Check all that apply:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Criminal history check (U02): Satisfactory completion of a criminal history background check</td>
</tr>
<tr>
<td>☐ CANRA (U13): Mandated Child Abuse Reporter</td>
</tr>
<tr>
<td>☐ Clery Act (U15): Campus Security Authority</td>
</tr>
<tr>
<td>☐ Credentials Verification (U06): For clinical practitioner</td>
</tr>
<tr>
<td>☐ Driver’s License (U08): Must maintain valid CA DL, a clean DMV record and enrollment in DMV course if applicable</td>
</tr>
<tr>
<td>☐ Form 700 (U16): Statement of Economic Interest Filer</td>
</tr>
<tr>
<td>☐ Works in patient care environment</td>
</tr>
<tr>
<td>☐ N/A</td>
</tr>
</tbody>
</table>

*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.*

### 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.*
Section 10 - Action Justification

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

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

- Is this action being performed for the purpose of recruitment? [Yes/No]
- Is this a Temporary Assignment/Stipend Action? [Yes/No]
- 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
- 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

<table>
<thead>
<tr>
<th>FOR RECLASS ACTIONS: Are the new duties currently being performed by the employee?</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOR RECLASS ACTIONS: Do a majority of the duties (more than 50%) align with a different or higher classification level?</td>
<td>N/A</td>
</tr>
<tr>
<td>FOR RECLASS ACTIONS: If scope, complexity, percent of time or frequency has changed, but the duties are essentially unchanged, explain</td>
<td>test test test</td>
</tr>
<tr>
<td>FOR ALL ACTIONS: Other comments to Compensation.</td>
<td>test test test</td>
</tr>
</tbody>
</table>

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...]

SAVE your work before continuing on.
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
2. End Date of Temp Assignment: 11/30/2021
3. 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

% of time to be spent on temporary duties: 45%

Complete all the questions on the Temporary Assignment section.
### Section 11 - Temporary Assignment/Stipend (continued)

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td>test test test</td>
</tr>
<tr>
<td>In addition to the temporary duties, will the employee continue to perform all of their regular duties? Please explain.</td>
<td>test test test</td>
</tr>
<tr>
<td>If No, what duties will be temporarily suspended or re-assigned?</td>
<td>test test test</td>
</tr>
<tr>
<td>Additional information to support the need for a temporary stipend.</td>
<td>test test test</td>
</tr>
</tbody>
</table>

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.
**Section 12 - Compensation Information**

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

<table>
<thead>
<tr>
<th>Salary Info For Reclass And Temporary Stipend Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Salary/Pay Rate</strong></td>
</tr>
<tr>
<td><strong>Effective Date of Current Salary/Pay Rate</strong></td>
</tr>
<tr>
<td><strong>Proposed percentage increase (i.e. 5, 10, 15)</strong></td>
</tr>
<tr>
<td><strong>Proposed New Salary/Pay Rate (reclasses only)</strong></td>
</tr>
<tr>
<td><strong>Proposed New Step/Grade (reclasses only)</strong></td>
</tr>
<tr>
<td><strong>Proposed stipend amount</strong></td>
</tr>
<tr>
<td><strong>Have you considered the impact of the above salary increase on other employees in your department?</strong></td>
</tr>
<tr>
<td><strong>Fund Source Information</strong></td>
</tr>
<tr>
<td><strong>HR Approved percentage increase</strong></td>
</tr>
<tr>
<td><strong>HR Approved new salary (reclasses only)</strong></td>
</tr>
<tr>
<td><strong>HR Approved Stipend Amount</strong></td>
</tr>
</tbody>
</table>

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.

Submitter Comments: test test test
Section 12 - Compensation Information (continued)

**Grade And Salary Range Info**

<table>
<thead>
<tr>
<th>Salary Plan</th>
<th>CTSB</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade</td>
<td>Grade 19</td>
</tr>
<tr>
<td>Hourly Range Min</td>
<td>$24.52</td>
</tr>
<tr>
<td>Hourly Range Midpoint</td>
<td>$33.00</td>
</tr>
<tr>
<td>Hourly Range Max</td>
<td>$41.33</td>
</tr>
<tr>
<td>Annual Range Min</td>
<td>$51,400</td>
</tr>
<tr>
<td>Annual Range Midpoint</td>
<td>$58,900</td>
</tr>
<tr>
<td>Annual Range Max</td>
<td>$66,300</td>
</tr>
</tbody>
</table>

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

SAVE your work before continuing on.

Section 13 - Workflow Approvals

**WORKFLOW APPROVALS**

<table>
<thead>
<tr>
<th>Step Name</th>
<th>Step Approver</th>
<th>Approval Date</th>
<th>Step Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Department Initiates Action (Active)</td>
<td>Lisa Romero</td>
<td>[N/A]</td>
<td>NotStarted</td>
</tr>
<tr>
<td>2. HR/Comp Reviews</td>
<td>Andrea Dittman</td>
<td>[N/A]</td>
<td>NotStarted</td>
</tr>
</tbody>
</table>

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.

SAVE.
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.
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

Run a spell check of all the text boxes in workflow.

Preview the PDF Print Version of the JD anytime during the workflow process. Click again to close the window.

View a list of the required fields that need to be completed.

Review the draft of the JD side-by-side with any CT Job Standard.
Green Workflow Tool Bar

Comment Bubble Icon:
View or add comments to the current workflow process.

Share Revision Version Icon:
Share this new or revised JD with another employee.

Compare Icon:
Compare this JD against another JD.

Invite Another User Icon:
Assign an Ad-Hoc reviewer to this workflow process.

Thumbs Up Icon:
Approve your step of the workflow process and advance the action to the next reviewer.

Show Workflow Status Icon:
Displays where this JD action is in the current workflow process.
Submitting a Job Description to HR/Compensation

1. Click on the Thumbs Up icon to begin the process of submitting the JD action to HR/Compensation.

2. An Email Notification window appears showing you who is next in the workflow process and who will receive an email notification.

3. Send a courtesy email to other participants. Add comments and their email address(es).

4. Approve your step of the workflow process.
Coming Soon:

Archiving a Job Description

Employee Acknowledgement Process

Email Notifications