# Job Builder User Guide - Submitter/Preparer

*Table of contents is dynamic - click on a topic and it will take you directly there.*

## Log In / Log Out

3

## Home Page Navigation

4

## Quick Links

5
- View My Job
- Jobs that Report to Me
- My Employees
- Job Library - Part 1
- Job Library - Part 2
- Job Catalog
- My Job Tasks
- CT Job Standards Matrix
- CT Job Standards
- Add a New Job Description (Create New JD)
  - From a Blank Job Description (i.e. from a CT Job Standard)
  - From a Base Job Description (i.e. from an existing JD in Library)
- Revise a Job Description (Update, Reclass, Stipend)

## Job Description Workflow Process

24
- Section 1 - Job Details
- Section 2 - Supervision
- Section 3 - Job Summary
- Section 4 - Essential Functions and Duties
- Section 5 - Qualifications
- Section 6 - Competencies
- Section 7 - Classification Factors

1
Section 8 - PEMs (Physical, Environmental, and Mental Requirements) 36
Section 9 - Special Conditions of Employment and Reporting Requirements 38
Section 10 - Action Justification 40
Section 11 - Temporary Assignment/Stipend 42
Section 12 - Compensation Information 44
Section 13 - Workflow Approvals 45
Section 14 - Job Posting 46
Finalize and Submit a Job Description to HR/Compensation 48
Workflow Screen Options 49
Green Workflow Tool Bar 50

Archiving a Job Description 51

Job Description (JD) Acknowledgement Process 52
Log In / Log Out

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

2. Log Out of Job Builder:
Home Page Navigation

Job Description System

Welcome
Kathy Moore

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

Search
JD Acknowledgements

2 Tasks

Please Review: TEST Job 2 for training  Job Description Review

Please Review: TEST Job 3 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.
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.
1. All job descriptions for positions that report directly or indirectly to you will appear in a searchable grid, including your own job description.
My Employees

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

- Narrow your search using the open text search.
- Narrow your search using the smart search drop-down filters.
- View and org chart of all the jobs that report to you.
- Export an Excel version of the grid.

- Single click on any row then click here to view details about this employee.
- 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 share this JD with the employee.
- Scroll right to see more columns.
1. The Job Library lists all the job descriptions in your assigned departments.
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

<table>
<thead>
<tr>
<th>Department</th>
<th>Position ID</th>
<th>System Title</th>
<th>UC Payroll Title</th>
<th>Working/Business Title</th>
<th>Union Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>PERS HUMAN RESOURCES</td>
<td>40035501</td>
<td>Administrative Manager 1 (40035501)</td>
<td>ADMIN MGR 1 (000547)</td>
<td>Manager, HR Employee Services</td>
<td>99 - Non-Represented</td>
</tr>
<tr>
<td>HASC HSSB ADMIN</td>
<td>40035516</td>
<td>Administrative Manager 1 (40035516)</td>
<td>ADMIN MGR 1</td>
<td>Director, HSSB Administrative</td>
<td>99 - Non-Represented</td>
</tr>
</tbody>
</table>

- Search by Position ID in the open search text box
- Narrow your search using pre-defined search filters
- Click on the carrot to view the Job Posting details for the highlighted row.
- Double click on a row to view a PDF version of the JD.
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.).
CT Job Standards Matrix

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

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

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

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

Double click on a job title to open a print version of the job standard.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Academic Human Resources</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grade 30</td>
<td>ACAD HR MGR 3 (000596)</td>
<td>BENEFITS MGR 3 (000290)</td>
</tr>
<tr>
<td>Grade 28</td>
<td>ACAD HR ANL 5 (000593)</td>
<td>BENEFITS MGR 2 (000291)</td>
</tr>
<tr>
<td>Grade 27</td>
<td>ACAD HR MGR 2 (000595)</td>
<td>ACAD HR MGR 1 (000594)</td>
</tr>
<tr>
<td>Grade 26</td>
<td>ACAD HR ANL 4 (000716)</td>
<td>ACAD HR SUPV 2 (007711)</td>
</tr>
<tr>
<td>Grade 25</td>
<td>ACAD HR ANL 4 GF (005894)</td>
<td>BENEFITS ANL 4 (007721)</td>
</tr>
<tr>
<td>Grade 24</td>
<td>ACAD HR ANL 3 (007715)</td>
<td>BENEFITS SUPV 2 (007723)</td>
</tr>
<tr>
<td>Grade 23</td>
<td>ACAD HR ANL 3 (007720)</td>
<td>BENEFITS SUPV 2 GF (006643)</td>
</tr>
</tbody>
</table>
CT Job Standards

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

### 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.

#### Classified Indicator Descr (Pers Prog)

<table>
<thead>
<tr>
<th>Compensation Analyst 1</th>
<th>Compensation Analyst 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSS</td>
<td>PSS</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Level</th>
<th>Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry</td>
<td>Grade 20</td>
</tr>
<tr>
<td>Intermediate</td>
<td>Grade 21</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status</th>
<th>Non-Exempt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Exempt</td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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.**

- **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 Job Description (Create New JD)

1. Add a New JD from a **Blank Job Description**
   
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. Choose a Template
   - Click on Blank Job to use a CT Job Standard to pre-fill your JD.

2. Enter a Working/Business title.

3. Select a template CT job standard to populate the new JD. See next few pages for instructions.

4. Select Workflow
   - Submitter Workflow (2 steps)
   - Department Initiates Action: Lisa Romero
   - HR/Comp Reviews: Select HR/Compensation

5. Click here to start the Workflow process.
Add a New Job Description - Blank Job (continued)

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

   - Click the 3-dot menu to bring up a list of CT job standard templates to choose from.
   - List of CT Job Standards to choose from
   - Type in the job title or job code that you want.
   - Or, use the smart filter to find the job template you want.
   - Click once to highlight the row you want.

   - Save the job standard to be added to your blank job.

   - Select Parent for the new Job Description
   - Save and Close

Job Standard

Parent/Child Settings File
UCSB Master Template
Add a New Job Description - Blank Job (continued)

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

---> Skip to Job Description Workflow Process
Add a New Job Description - Base Job

2. Add a New JD from a Base Job Description
   a. 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.
Add a New Job Description - Base Job (continued)

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

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

"Company Jobs" is another name for UCSB jobs.

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

Scroll down to see all jobs listed.

Click here once you've made your selection.

Save and Close
Add a New Job Description - Base Job (continued)

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

Enter the unique Working/Business Title for your JD.

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

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.)

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.

----> Skip to Job Description Workflow Process
Revise a Job Description (Update, Reclass, Stipend)

1. Use the “Revise a Job Description” action for JD updates, reclasses or temporary stipends.
Revise a Job Description (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 dropdown 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.
### Position Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position ID:</strong></td>
<td>TBD_162</td>
</tr>
<tr>
<td><strong>UC Payroll Title:</strong></td>
<td>ADMIN OFCR 3 (007377)</td>
</tr>
<tr>
<td><strong>UC Job Code:</strong></td>
<td>007377</td>
</tr>
<tr>
<td><strong>System Title:</strong></td>
<td>Administrative Officer 3 (TBD_162)</td>
</tr>
<tr>
<td><strong>Working/Business Title:</strong></td>
<td>TEST Job 2 for training</td>
</tr>
<tr>
<td><strong>CT Job Family:</strong></td>
<td>General Administration</td>
</tr>
<tr>
<td><strong>CT Job Function:</strong></td>
<td>Administrative Operations</td>
</tr>
<tr>
<td><strong>Classified Indicator Descr (Pers Prog):</strong></td>
<td>PSS</td>
</tr>
<tr>
<td><strong>Salary Grade:</strong></td>
<td>Grade 22</td>
</tr>
<tr>
<td><strong>FLSA Status:</strong></td>
<td>Exempt</td>
</tr>
<tr>
<td><strong>FLSA Override:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Employee Class (Appt Type):</strong></td>
<td>2 - Staff: Career</td>
</tr>
<tr>
<td><strong>Rehired Retiree?:</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>Union Code (Collective Bargaining Unit):</strong></td>
<td>99 - Non-Represented (PPSM)</td>
</tr>
<tr>
<td><strong>ERC (Empl Rel Code):</strong></td>
<td>E-All Others - Not Confidential</td>
</tr>
<tr>
<td><strong>% of Time (i.e. 100, 75, 43.5):</strong></td>
<td>100</td>
</tr>
<tr>
<td><strong>Working Days and Hours:</strong></td>
<td>M-F; 8-5pm</td>
</tr>
<tr>
<td><strong>Work Location (building, office, room number, cubicle):</strong></td>
<td>Cheadle Hall - 4219, cubicle 6</td>
</tr>
</tbody>
</table>
Section 1 - Job Details (continued)

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.

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

   - Name: John Doe
   - Payroll Title: Compensation Analyst 3
   - % of Time: 100

   - Name: Jane Smith
   - Payroll Title: Compensation Analyst 3
   - % of Time: 100

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

   - N/A

5. **Other Positions Supervised (limited, contracts, and students)**

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

<table>
<thead>
<tr>
<th>Other Positions Supervised</th>
<th>Blank Assistant 2, 50%, Limited 1-3 Student Assistants</th>
</tr>
</thead>
</table>

   - Enter other non-career positions supervised.

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

**JOB SUMMARY**

**General Summary of Job Duties and Responsibilities**

Financial & Business Operations Analyst under the general direction of the Associate Business Operations Manager. Financial & Business Operations Analyst ("Analyst") plays a key role in the efficient functioning of the departments within the Office of Public Affairs and Communications ("OPAC"). Primary responsibilities focus on supplies & expenses management, contract administration, payroll, accounts receivable, accounts payable, purchasing, and data entry. Assists in maintaining a comprehensive database of departmental expenses and summaries. Serves as the back-up to the Associate Business Manager and Financial Analyst for the Business and Financial unit for the Division of Institutional Advancement ("DIV"). Coordinates with the divisional Time Leave requests, maintains departmental personnel files. Assists in ensuring financial control in all aspects of the unit's operations, including payroll, vendor contracts, and payments. Communicates with development staff, vendors, and campus providers with a focus on financial services concepts. Applies organization policies and procedures to problems of moderate scope. Works on financial services problems with a variety of moderately complicated issues. Corresponds with divisional staff, vendors, and campus providers with a focus on financial services concepts. 

**CT Job Function Summary**

Involves the processing and servicing of a variety of operational, personnel, and financial transactions. This includes but is not limited to: payroll, accounts receivable, accounts payable, purchasing, and data entry. Assists in maintaining a comprehensive database of departmental expenses and summaries. Serves as the back-up to the Associate Business Manager and Financial Analyst for the Business and Financial unit for the Division of Institutional Advancement ("DIV"). Coordinates with the divisional Time Leave requests, maintains departmental personnel files. Assists in ensuring financial control in all aspects of the unit's operations, including payroll, vendor contracts, and payments. Communicates with development staff, vendors, and campus providers with a focus on financial services concepts. Applies organization policies and procedures to problems of moderate scope. Works on financial services problems with a variety of moderately complicated issues. Corresponds with divisional staff, vendors, and campus providers with a focus on financial services concepts. 

**CT Generic Scope Description**

Professional who applies acquired job skills and principles to solve routine and moderately complicated problems. Exercises judgment concerning initiatives, determines 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.

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

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

3. 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.
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, etc., 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.
3. Make sure %'s add up to 100%.
4. Non-essential duties are peripheral, incidental, or minimal duties that would not adversely affect the job if removed.
5. The "Other Requirements" section is not editable and applies to all positions.

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 this JD.
Section 5 - Qualifications (continued)

### Licenses and Certifications

<table>
<thead>
<tr>
<th>Add</th>
<th>Delete Row</th>
<th>Move Up Row</th>
<th>Move Down Row</th>
<th>Refresh</th>
<th>Undo</th>
</tr>
</thead>
</table>

*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**

<table>
<thead>
<tr>
<th>N/A</th>
<th>Required/Preferred</th>
</tr>
</thead>
</table>

**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.
- Well-developed computer skills including proficiency in Word, Excel, PowerPoint, Internet and e-mail and database programs and application portals.
- 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 work under pressure and take the initiative to effectively solve problems and demonstrate sound reasoning and judgment.
- Ability to establish and maintain 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.**

---

*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

**UC Core Competencies**
The core competencies below apply to all UC staff employees, regardless of location, leveraged 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 the skillsets needed to perform successfully on the job. Consistently works to learn additional skills and avenues 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 in addition to the UC Core Competencies.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Level</th>
<th>Competency Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functional Knowledge</td>
<td>1. Entry</td>
<td>Knowledgeable about his/her specific job.</td>
</tr>
<tr>
<td>Collaboration</td>
<td>2. Novice</td>
<td>Creates internal alliances outside the immediate team or department.</td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>Competency</th>
<th>Level</th>
<th>Interview Question</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytical Thinking</td>
<td>2. Novice</td>
<td>How do you determine the best process for handling a new task?</td>
<td></td>
</tr>
<tr>
<td>Functional Knowledge</td>
<td>1. Entry</td>
<td>How do you gain the knowledge to do your job?</td>
<td></td>
</tr>
</tbody>
</table>

**Instructions**
1. Click here to open the Functional Competency chart.
2. Click on each box that applies to add functional competencies and Interview questions.
3. Save your work before continuing on.
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 analysis is required to 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, i.e., 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, and actions taken 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.
Section 7 - Classification Factors (continued)

Financial Responsibilities

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

2. This position has authority to approve small, moderate, or significant financial expenses.
   - For any financial figures being reported, base it on the previous year.

Budgetary Responsibilities (previous fiscal year)

3. 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>Total Permanent Operating Budget</td>
<td>Department</td>
<td>$1,500,000</td>
<td>test</td>
</tr>
<tr>
<td>Total Annual Expenditures</td>
<td>Department</td>
<td>$150,000</td>
<td>test</td>
</tr>
<tr>
<td>Recharge and Income Revenue</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gifts and Endowment Income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract and Grant Funds Awarded</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Program Funding</td>
<td>Program</td>
<td>$150,000</td>
<td>test</td>
</tr>
<tr>
<td>Faculty Start-Up Funding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please explain)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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

### Other Financial Information

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

SAVE your work before continuing on.
Section 8 - PEMs (Physical, Environmental, and Mental Requirements)

**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>

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.

**Other Physical Requirements**

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

test test test

**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)

4. 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.

5. 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>

6. Travel Requirements
   - Select an approximate % of time from the drop-down list.
   - SAVE your work before continuing on.
Some positions are defined as "critical" and require a background check. Please check all of the boxes that apply below. For more information on critical positions and background checks, type in "background checks" on the HR website at hr.ucsb.edu.

<table>
<thead>
<tr>
<th>Box</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Master key access to University-owned residence and/or other facilities</td>
</tr>
<tr>
<td>☑</td>
<td>Direct responsibility for the care, safety and security of humans or animals; or the safety and security of personal or University property</td>
</tr>
<tr>
<td>☑</td>
<td>Direct access to, or responsibility for, cash and cash equivalents or University property disbursements or receipts</td>
</tr>
<tr>
<td>☐</td>
<td>Direct access to, or responsibility for, controlled substances or hazardous materials</td>
</tr>
<tr>
<td>☐</td>
<td>Extensive authority for committing the financial resources of the University</td>
</tr>
<tr>
<td>☐</td>
<td>Responsibility for operating commercial vehicles, machinery or toxic systems that could cause accidental death, injury or health problems</td>
</tr>
<tr>
<td>☐</td>
<td>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</td>
</tr>
<tr>
<td>☐</td>
<td>Direct access to, and/or responsibility for, information affecting national security</td>
</tr>
<tr>
<td>☑</td>
<td>Direct access to, and/or responsibility for, protected, personal, or other sensitive data</td>
</tr>
<tr>
<td>☐</td>
<td>N/A</td>
</tr>
</tbody>
</table>

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

Reporting and Background Check Requirements

2. Per PPSC policy, a position that is defined as "critical" requires a background check. Please check all of the boxes that apply below. For more information on background checks, type in "background checks" on the HR website at hr.ucsb.edu.

- Criminal history check (U02): Satisfactory completion of a criminal history background check
- CANRA (U13): Mandated Child Abuse Reporter
- Clergy 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 any of the Essential Elements of a Critical Position were checked in the above section, you will be required to check the Criminal History Background.

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

Special Training Requirements

3. Some positions require SPECIAL TRAINING in addition to the mandatory training requirements that apply to all positions. Please check all of the special training boxes that apply below.

- F: Form 700 Filers (statement of economic interest). Applies to employees who make or influence governmental decisions and ensures no conflict of interest for designated officials.
- G: Ethics and Compliance Briefing for Researchers. Applies to all UC researchers, as defined by UCP.
- L: Clergy Act (Campus Security Authority). Applies to employees responsible for campus security, individuals to which students and employees should report criminal offenses, or employees with significant responsibility for student and campus activities.
- M: CANRA Mandated Reporting. Applies to Mandated Reporters who are individuals whose duties bring them into contact with children regularly or who supervise staff whose duties bring them into contact with children regularly.
- N: NSF RCR. Applies to all undergraduate students, graduate students, postdoctoral researchers, faculty, and other senior personnel on research projects supported by National Science Foundation awards.
- S: Sexual Harassment Training for non-HEERA supervisors. Applies to employees who supervise less than 2.0 career FTE and/or only supervise other non-career employees in student, limited or contract appointments. If an employee has an ERC of A, B, C, or D, you do NOT need to check this box.
- B: NSF RCR Exempt. Applies to employees exempt from Responsible Conduct in Research training. Checking this box requires approval from the UCSB Office of Research Integrity (https://www.research.ucsb.edu/research-integrity/rcr).
- E: Exempt from Sexual Harassment Training for HEERA Supervisors. Applies to employees who supervise 2.0 or more career FTE yet aren't required to take the SHP training for supervisors. Checking this box requires approval from the UCSB Office of Title IX and Sexual Harassment Policy Compliance (https://titleix.ucsb.edu/about/contacts).
Section 10 - Action Justification

If this section contains historical information, press the CLEAR button prior to entering new information.

Clear Action Justification Page

ACTION JUSTIFICATION

Submitters Name: Kathy Moore
Submitters Phone: 805-893-7137
Compensation Reviewer Assigned: Kathy Moore

Is this action being performed for the purpose of recruitment? Yes
Is this a Temporary Stipend Action? If Yes, skip the remainder of this section. No

If answers to the questions below are insufficient or the fields are left blank, the action may be returned to the submitter. HR requires this information in order to adequately evaluate the requested action.

If this is a LIMITED or CONTRACT position, what are the approximate begin and end dates of the appointment?
n/a

FOR ALL ACTIONS: Please explain the basis for submitting this job description for review.

Test test test

FOR ALL ACTIONS: Please include any helpful information such as background and context to explain your proposal.

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 this question not applicable.

Test test test

Information from previous actions will carry forward to new actions so click here to create a blank slate.

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

This helps HR prioritize the action.

Complete each question so that HR/Comp has a clear picture of why you’re submitting this action.
Section 10 - Action Justification (continued)

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

2. FOR RECLASS ACTIONS: Are the new duties currently being performed by the employee?
   Yes
   No

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

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

5. FOR ALL ACTIONS: Other comments to Compensation.
   test test test

Approvals
Have you received all required divisional pre-approvals before submitting this action?

Department Head Name and Date:
[Name] [Date]

Control Point Name and Date:
[Name] [Date]

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...

Please make sure to follow the approval process for your division and control points before submitting an action to HR.

SAVE your work before continuing on.
Section 11 - Temporary Assignment/Stipend

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

*Information from previous actions will carry forward to new actions so click here to create a blank slate.*

**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
2. End Date of Temp Assignment
3. Revised End Date of Temp Assignment

*Tip: Don’t forget to enter a proposed stipend amount on the next tab.*

If answers to the questions below are insufficient or left blank, the action may be returned to the submitter. HR requires this information in order to adequately evaluate the requested action.

Briefly describe the basis or reason for this temporary assignment.

Provide a detailed description of the duties and responsibilities to be performed on a temporary basis. Include enough detail for the Compensation Reviewer to be able to identify the appropriate classification and level of the work.

% of time to be spent on temporary duties.
If the duties came from another employee’s job, include employee’s name and payroll title.

Are the temporary duties classifiable at a higher level per the Career Tracks Job Standards / Series Concepts, or are they at the same level but significantly different than what the employee normally performs? Please explain.

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

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

Additional information to support the need for a temporary stipend.

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

If this section contains historical information, press the CLEAR button prior to entering new information.

Information from previous actions will carry forward to new actions so click here to create a blank slate.

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

Salary Info For Reclass And Temporary Stipend Actions

For all fields, please indicate hourly rates for BW employees and annual rates for MO employees.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Salary/Pay Rate</td>
<td>$28.50</td>
</tr>
<tr>
<td>Effective Date of Current Salary/Pay Rate</td>
<td>7/1/2023</td>
</tr>
<tr>
<td>Proposed reclass percentage increase (i.e. 5, 10, 15)</td>
<td>10</td>
</tr>
<tr>
<td>Proposed New Salary/Pay Rate (reclasses only)</td>
<td>$31.35</td>
</tr>
<tr>
<td>Proposed New Step/Grade (reclasses only)</td>
<td>19</td>
</tr>
<tr>
<td>Proposed stipend amount (enter a pro-rated monthly or biweekly amount)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Proposed stipend percentage (i.e. 5, 10, 15)</td>
<td></td>
</tr>
<tr>
<td>Have you considered the impact of the above salary increase on other employees in your department?</td>
<td>Yes</td>
</tr>
<tr>
<td>Fund Source Information</td>
<td>19900</td>
</tr>
</tbody>
</table>

HR Approved percentage increase: 10

HR Approved new salary (reclasses only): $31.35

HR Approved Stipend Amount: $0.00

Please provide a detailed justification or other comments to support the proposed compensation for this action.

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

1. If you're proposing a reclass or stipend, complete the fields in these sections.
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.**
Section 14 - Job Posting

**Payroll Title:** COMPENSATION ANL 3 (007726)

**Job Code:** 007726

**Job Open Date:**

**Application Review Begins:**

**Department Code (Name):** TEST (TEST DEPARTMENT)

**Percentage of Time:** 100

**Union Code (Name):** 99

**Employee Class (Appointment Type):** Staff: Career

**FLSA Status:** Exempt

**Classified Indicator Description (Personnel Program):** PSS

**Salary Grade:** Grade 23

**Hiring/Budgeted Salary or Hourly Range:** The budgeted salary range that the University reasonably expects to pay for this position is $_______ to $_______/year.

**Full Salary Range:** The full salary range for this position is $_______ to $_______/year. Salary offers are determined based on final
### Qualifications:

*Note to Hiring Manager: Use the following list of qualifications to create your **REQUIRED** and/or **PREFERRED** qualifications below.*

- Bachelor’s degree in related area and / or equivalent experience / training
- 1-3 years Compensation Analysis Preferred or
- 1-3 years Human Resources field Preferred
- Demonstrates skills and experience as a seasoned professional with a comprehensive understanding of compensation concepts.
- Applies compensation policies, and procedures, as well as, knowledge of various federal and state labor laws and regulations, to resolve a variety of compensation-related issues of significant scope and complexity where analysis of situations and data requires a review of a variety of factors.
- Resolves complex issues in imaginative and practical ways where analysis of situations and data requires a review of a variety of factors.
- Develops and implements compensation programs for client groups as necessary and as requested.
- Understands how various initiatives may impact areas of human resources.
- Prioritizes competing work assignments and meets deadlines.
- Works well with data, including utilizing a variety of databases and query tools, exporting data to various platforms, and large sets of data using advanced Excel tools, creating data summaries, and designing data reports.
- Is highly effective at being productive, cooperative, and establishing mutually beneficial relationships with coworkers, peers, and management.
- Exercises judgment within defined compensation procedures and practices to determine appropriate compensation.
- Demonstrates highly effective analytical skills to conduct analysis and develop recommendations.
- Certified Compensation Professional credential preferred.

### Required Qualifications:

### Preferred Qualifications:
Finalize and Submit 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.
Workflow Screen Options

- Spell check
- Employees
- Preview Pane
- Split Screen
- Form Errors

- 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.
- View the employee(s) linked to this JD.
- Review the draft of the JD side-by-side with any CT Job Standard.
Green Workflow Tool Bar

- **Save and Close**
- **Discard Draft**
- **Workflows**

### Green Section

#### This Job is in Workflow: Action Required

- **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.
- **Invite Another User Icon:** Assign an Ad-Hoc reviewer to this workflow process.
- **Show Workflow Status Icon:** Displays where this JD action is in the current workflow process.
- **Thumbs Up Icon:** Approve your step of the workflow process and advance the action to the next reviewer.
- **Compare Icon:** Compare this JD against another JD.

---

This is a diagram illustrating various workflow actions available within a workflow system. Each icon represents a specific function, such as saving, discarding, comments, sharing, inviting others, showing workflow status, and comparing documents. The green section highlights the current state of the workflow process, indicating an action is required.
Archiving a Job Description

- Follow the instructions to Revise a Job Description. On the Job Details section, select YES for the “Archive this Job Description” field.
- In the Action Justification section, indicate why you want to archive the job description.
- Click the thumbs-up button on the workflow toolbar to submit the job description to archives.
- If there are many required fields preventing you from archiving the JD, submit a ServiceNow ticket to Compensation to have them override the required fields and archive the JD for you.

Please remember to save your work frequently.

**JOB DETAILS**

View tool tips for additional information on filling out the Job Details section. A downloadable Job Description template is available on the HR website at https://www.hr.ucsb.edu/hr-units/compensation/oais

**Job History/Status**

- Archive this Job Description: No
- Approved Date: 10/21/2021 6:31:39 PM (PST)
- Date Last Edited: 6/13/2024 6:37:08 PM (PST)
- Last Action Approved: HR Admin Update
- Last Action Effective Date: 7/1/2022

*The Action Requested field must reflect the current action type. (Note: "Position Only Update (Posn Mgmt)" is for HR use only.)*
Job Description (JD) Acknowledgement Process

The JD Acknowledgement process is initiated when employees are newly hired, promoted to another position, reclassified, or have updates made to their job description.

The JD (Job Description) can be acknowledged in one of two ways.
1. The first is by clicking on the link in the email that was sent after you were hired; and
2. The second is by logging into Job Builder.

Acknowledgement via the Email Link:

1. An email is automatically sent to the employee linked to the job description (see sample email below). When you receive a JD Acknowledgement email, start the process by clicking on the link in the email:

   ![Sample Email](image)

   Click here to begin the JD acknowledgement process.
2. Read the instructions and then review your job description.

3. View your job description before acknowledging it.
4. View, print and/or download your job description. Close the window when done.

8. Click "Close Form" when done viewing your JD.

5. Scroll down to view your job description.

6. Print a copy of your job description, if you desire.

7. Download a PDF or Word version of your job description, if you desire.
5. Check the acknowledgement box and click on “Complete Workflow Step”:

![Employee Acknowledgement](image)

9. Check the box and then click on “Complete Workflow Step”.

10. View Job Description 'Compensation Manager 1 (40035711)'.

11. I acknowledge that I have received and reviewed my job description.

12. Compensation Manager 1 (40035711) was acknowledged by Kathryn Moore on 11/10/2021

6. Finalize the acknowledgement process by checking the box and clicking “Confirm”.

![My Sign-Off](image)

11. Check the box and click “Confirm” to complete the JD acknowledgment process.

7. You no longer need to print out and sign your job description. The online acknowledgement process replaces the old process of wet-signing JDs.
Acknowledgement via Logging into Job Builder:

1. An employee can log into Job Builder to acknowledge receipt of their job description. Follow the instructions for logging in on page 3.

2. On the Home Page, double click on the Acknowledgement link.
3. Scroll through the job description to review it and then click on Accept to acknowledge receipt of the JD.

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Amelia Leeman</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Name</td>
<td>Richard Van Hoorn</td>
</tr>
<tr>
<td>Department</td>
<td>RECR</td>
</tr>
<tr>
<td>Cycle</td>
<td>2024 New Job Description Acknowledgement</td>
</tr>
</tbody>
</table>

View tool tips for additional information on filling out the Job Details section. A downloadable Job Description template is available on the HR website at https://www.hr.ucsb.edu/hr-units/compensation/oads

Job History/Status
- Approved Date: 6/20/2024 1:53:25 PM
- Date Last Edited: 6/20/2024 1:53:23 PM
- Last Action Approved: Position Mgmt Update
- Last Action Effective Date: 6/14/2024

Organization Details
- Business Unit (Location): SBCMP
- Department Code: RECR
- Department Name: RECR (PHYSICAL ACTIVITIES&RECREATION)
- Division Name: Student Affairs

Department Profile (Specific Information about Department/Program): The UCSB Department of Recreation provides programs, services, and facilities for students, staff, faculty, and community members which promote an active, balanced lifestyle that contributes to the development of social, emotional, and physical health essential to long-term wellbeing.

Position Details
- Position ID: 410999731

Use the scroll bar to view the entire job description.

Click on Accept to acknowledge receipt of your job description.