



# TUTORIAL

## Creating a New Job Description using OACIS

### Getting Started

1. First, log on using your employee ID and personal password. If you don't yet have an account, contact HR at x3166.
2. If you have more than one "user type," make sure it says "Your Current Group: Submitter" on the top of the screen.



• Welcome **Dayna Williamson**. You are logged in.  
Your Current Group: Submitter.

(Note: Most users will not have to worry about this step, as it only applies for people who are both *Submitters and Reviewers* or *Submitters and Preparers*. Most users are *only Submitters*.)

### Begin the Action

3. Next, go to the left side of the screen and click on the **Begin New Action** link.
4. The "new action" you will begin is either **Create New Career Job Description** or **Create New Limited Appointment Job Description\*\***. Click on one to continue.

**Create New Career Job Description**  
[Start Action](#)

**Create New Limited Appointment Job Description**  
[Start Action](#)

\*\*See notes at the end of this tutorial for additional details about Limited Job Descriptions.



5. Now you are in the **Create New Career Job Description** action. The first tab is the **Proposed Job Title** tab. This is where you can tell the Compensation Analyst what title you *think* the job title should be. If you don't know, you can choose "0000" for "Undecided." If you are using this action to enter the employee's previously classified job description into the system for the first time, select the employee's current payroll title. Use the search options to find the title.

**Action: Create New Career Job Description**

Proposed Title	Proposed Job Details	Search Job Duties to Copy	Proposed Job Duties	Action Justification	Action Approval Steps
<p>On this tab, please select the desired new title for this Job Description. You may search for titles using the search feature on this tab. If you are unsure about what title to select, contact your <a href="#">Compensation Analyst</a> or select "0000, Undecided". <b>After you search for the title, you must choose "Select and Continue" below the title name.</b></p>					
<p><b>Search Titles to Assign to this Position</b></p> <p>Payroll Title: <input type="text" value="Any"/> Title Code: <input type="text"/></p> <p>FOC Code: <input type="text" value="Any"/> CBU (Collective Bargaining Unit): <input type="text" value="Any"/></p> <p><input type="button" value="SEARCH"/> <input type="button" value="CLEAR RESULTS"/></p> <p><input type="button" value="DO NOT SELECT A NEW TITLE, CONTINUE TO NEXT PAGE &gt;&gt;"/></p> <p>SAVE AND STAY ON THIS PAGE</p>					

For instance, you can click the arrows on the drop-down field by **Payroll Title** to select "  Assistant III."

**Search Titles to Assign to this Position**

Payroll Title:

After you select the title, you must click **select and continue**.

[Select and Continue](#)



## Write the Job Description

6. Now you are on the **Proposed Job Details** tab. This is where you enter the basics about the job description, such as name, department, work location, names of employees supervised and special conditions of employment. This tab is also where you enter the physical, mental and environmental information about the job.

If you are preparing this job description for a recruitment, you may leave the Name fields blank.

Answer all of the questions on the tab, especially the questions with a red \*. These questions are required and you will not be able to proceed with the action until they are completed.

**Action: Create New Career Job Description**

Proposed Title	Proposed Job Details	Search Job Duties to Copy	Proposed Job Duties	Action Justification	Action Approval Steps
<a href="#">&lt;&lt; RETURN TO PREVIOUS</a> <a href="#">CONTINUE TO NEXT PAGE &gt;&gt;</a>					
*Required information is denoted with an asterisk.					
<b>Employee Details</b>					
Employee First Name:		<input type="text"/>			
Employee Last Name:		<input type="text"/>			
Employee Id Number:		<input type="text"/>			
<b>Position Title</b>					
Payroll Title		<input type="text" value="ASSISTANT III"/>			

Most questions require text or dates. To answer the physical, mental and environmental requirements questions, click on the circles.

* Stand	<input checked="" type="radio"/> No Response	<input type="radio"/> N/A	<input type="radio"/> OCCAS.	<input type="radio"/> FREQ.	<input type="radio"/> CONTIN.
* Walk	<input checked="" type="radio"/> No Response	<input type="radio"/> N/A	<input type="radio"/> OCCAS.	<input type="radio"/> FREQ.	<input type="radio"/> CONTIN.
* Sit	<input checked="" type="radio"/> No Response	<input type="radio"/> N/A	<input type="radio"/> OCCAS.	<input type="radio"/> FREQ.	<input type="radio"/> CONTIN.
* Bend	<input checked="" type="radio"/> No Response	<input type="radio"/> N/A	<input type="radio"/> OCCAS.	<input type="radio"/> FREQ.	<input type="radio"/> CONTIN.
* Crouch/Squat	<input checked="" type="radio"/> No Response	<input type="radio"/> N/A	<input type="radio"/> OCCAS.	<input type="radio"/> FREQ.	<input type="radio"/> CONTIN.
* Kneel/Crawl	<input checked="" type="radio"/> No Response	<input type="radio"/> N/A	<input type="radio"/> OCCAS.	<input type="radio"/> FREQ.	<input type="radio"/> CONTIN.
* Climb	<input checked="" type="radio"/> No Response	<input type="radio"/> N/A	<input type="radio"/> OCCAS.	<input type="radio"/> FREQ.	<input type="radio"/> CONTIN.

When you have completed the information on this tab, click on the **Continue to Next Page** button.

At any time, on any tab, you can save your work by clicking the **Save and Stay on This Page** button. All required fields (with \*) on the page must be completed. Once complete, "Continue to Next Page."

**SAVE AND STAY ON THIS PAGE**

**CONTINUE TO NEXT PAGE >>**

7. The next tab is the **Search Duties to Copy** tab. This is an optional tab. If you would like to copy another employee's duties and use them in this job description, search for that employee here. If not, you can skip to the next tab.

**Action: Create New Career Job Description**

Proposed Title	Proposed Job Details	Search Job Duties to Copy	Proposed Job Duties	Action Justification	Action Approval Steps
This tab is OPTIONAL. If you would like to select <b>another employee's job duties to appear</b> on the Proposed Job Duties tab, use the search options below. Find that employee's Job Description, click on <b>"Select and Continue"</b> , then edit the job duties as needed.					
<b>Search Job Description Library</b>					
Payroll Title	<input type="text" value="Any"/>	First Name	<input type="text"/>		
Title Code	<input type="text"/>	Last Name	<input type="text"/>		
Department	<input type="text" value="Any"/>	Emp Id #:	<input type="text"/>		
Appointment Type:	<input type="text" value="Any"/>	Working Title	<input type="text"/>		
Provision Number	<input type="text"/>	CBU (Collective Bargaining Unit)	<input type="text" value="Any"/>		
<a href="#">SEARCH</a> <a href="#">CLEAR RESULTS</a>					

*Note: This is particularly helpful for entering multiple, identical job descriptions into OACIS.*

8. The next tab is the **Proposed Job Duties** tab. On this tab, you will enter in the employee's job functions and job duties.

**Action: Create New Career Job Description**

<a href="#">Proposed Title</a>	<a href="#">Proposed Job Details</a>	<a href="#">Search Job Duties to Copy</a>	<b>Proposed Job Duties</b>	<a href="#">Action Justification</a>	<a href="#">Action Approval Steps</a>
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Please list in order of importance, and in detail, the job functions and duties assigned to this position and estimate the percentage of time given to each function. Percentages must add up to 100% (regardless of part-time status). Need Help? Click [here](#).

When you are finished adding your entries, you may go to the next page by clicking "Continue to Next Page".

To Add A New Entry: Click the **Add New Entry** button.  
 To Edit An Entry: Click the **Edit** link for the specific entry.  
 To View An Entry: Click the **View** link for the specific entry.  
 To Delete An Entry: Click the **Delete** link for the specific entry.

**ADD NEW ENTRY** First, click Add New Entry.

In this window, you can copy/paste from a word document or type directly into the field. Click **Add Entry** when you are finished.

**Add New Entry**

\* Required information is denoted with an asterisk.

\* Order of Importance:

\* Essential Duty?:

\* Percent of Total Time:

Job Function:

\* Frequency:

\* Duties Performed:

- \* Answers phone at front desk
- \* Responds to customer inquiries
- \* Updates front desk procedures manual as needed

**ADD ENTRY** **CANCEL**

This is what the tab will look like after you complete a new job duty entry.

**Existing Entries**

Total Percentage of Duties: **25**

1 Record

Order of Imp	Essen Duty	%	Freq.	Function	Duties
1	Yes	25	Daily	Front Desk Reception	* Answers phone at front desk * Responds to customer inquiries * Updates front desk procedures manual as needed <a href="#">View</a>   <a href="#">Edit</a> <a href="#">Delete</a>

Continue adding new entries until you are done writing the job description. You may edit your entries by clicking the **Edit** link or delete your entries by clicking the **Delete** link. Need help writing the job description? Click on the **Help** link on the top of the tab.

Your "Total Percentage of Duties" should ALWAYS equal 100% when you have completed all entries.

When you are done entering in job duties, click **Continue to Next Page**.

**CONTINUE TO NEXT PAGE >>**



## Justify the Action

9. The next tab is the **Action Justification** tab. On this tab, you will provide information about the action that will help HR properly classify the position. Include any details that will help the Compensation Analyst understand the rationale behind creating this position.

If you plan to recruit for the New JD immediately after it is approved, indicate this by selecting “Yes” in the first dropdown field.

Complete the rest of the questions on this tab then click on **Continue to Next Page**.

**CONTINUE TO NEXT PAGE >>**

**Action: Create New Career Job Description**

<a href="#">Proposed Title</a>	<a href="#">Proposed Job Details</a>	<a href="#">Search Job Duties to Copy</a>	<a href="#">Proposed Job Duties</a>	<b>Action Justification</b>	<a href="#">Action Approval Steps</a>
<a href="#">&lt;&lt; RETURN TO PREVIOUS</a> <b>CONTINUE TO NEXT PAGE &gt;&gt;</b>					
<p><i>*Required information is denoted with an asterisk.</i></p> <p>Is this action being performed for the purpose of a recruitment? <input type="text" value="No"/></p> <p>Compensation Reviewer: <input type="text" value="Joy, Mary Jo"/></p> <p>* Submitted By: <input type="text" value="Williamson, Dayna"/></p> <p>* Submitter's Phone: <input type="text" value="x4666"/></p> <p>Entering in current job description.</p> <p>Briefly explain the basis for creating this Job Description:</p>					

## Approve the Action

10. The last tab is **Action Approval Steps**. At this point, if you do not yet know your department's approval process for Newly Created Job Descriptions, find out now. Some departments have delegated authority for such actions down to the Department level. Other departments require Control Point approval prior to submitting a new job description for formal classification. As a Submitter, you are responsible for making sure that your internal department approval process is followed.

**Action: Create New Career Job Description**

<a href="#">Proposed Title</a>	<a href="#">Proposed Job Details</a>	<a href="#">Search Job Duties to Copy</a>	<a href="#">Proposed Job Duties</a>	<a href="#">Action Justification</a>	<b>Action Approval Steps</b>
<a href="#">&lt;&lt; RETURN TO PREVIOUS</a> <b>CONTINUE TO NEXT PAGE &gt;&gt;</b>					
<p>This tab records the approvals you have received for this action. Most campus departments require at least Department Head and Control Point approvals for both "Reclassification" and "Create a New Job Description" actions. Some departments may also require these approvals for "Update a Job Description" actions. However, your department's approval requirements may differ. <b>Supervisors must learn what their approval process is before submitting the action request to Compensation.</b></p> <p>To obtain approvals, you may either print a <a href="#">hardcopy</a> of the action request or ask the person responsible for the approval to follow the instructions for <a href="#">online</a> review.</p> <p>Please Note: Formally submitting the action to HR for review is the responsibility of the Supervisor who began the action request. The Supervisor completes this process by selecting "Preview Action" (at end of this page), then "Submit to Compensation".</p>					

If all approvals have been obtained, the Submitter would select “Yes” in the dropdown field on the top of the page. However, it is possible that the Submitter may be preparing this action in preparation for a later submission to Compensation. If so, they may want to **Save** the action now and obtain department approvals later. If so, the Submitter would select “No” in the dropdown field. The rest of the fields could then be left blank and the action could be saved for submission at a later date.

Has this request received all required approvals?

\* If 'YES', then complete the information below. If 'NO', obtain appropriate approvals before continuing. See above instructions for help.



## How does a Submitter obtain the required Approvals?

As the instructions on the tab indicate, there are **two ways** a Submitter may obtain approvals:

- (1) printing a hardcopy and delivering this to the Reviewer, or
- (2) asking the Reviewer to go online to review the action

**How to Print a Hardcopy of the Action Summary:** HR recommends that Reviewers get into the habit of reviewing actions online. However, if the person(s) responsible for review would like a *hardcopy*, the Submitter may click **Preview Action** then print the **Action Summary**. The Reviewer(s) then reviews the hardcopy, approves or denies the request and informs the Submitter of his/her decision. Your department may choose to retain actual “wet” signatures at this point, but HR does not require it.

**How the Reviewer reviews the Action online:** If the person(s) responsible for review would like to see the action *online*, they would do so by logging into OACIS as a **Reviewer**. They would then go to **Pending Actions**, sort the list by clicking on the arrow next to any of the column headers, and click **View** under the employee’s last name. The Reviewer may scroll down the page to read the action summary or click **Edit** at the top of the tab to make changes and/or write comments in the **Action Approval Steps**. The Reviewer then clicks **Preview Action, Save for Department Review**, and tells the Submitter that the action is ready for submission to Compensation.

In this example to the right, Joe Smith gave his approval over the phone to the Submitter, who recorded this in the space provided for her own records.

Department Approver - Name	Joe Smith
Department Approver - Date	04-30-2005 MM/DD/YYYY -or- MM-DD-YYYY
Department Approver - Comments	Approved via phone call.
Control Point Approver - Name	Mary Sotherby
Control Point Approver - Date	04-30-2005 MM/DD/YYYY -or- MM-DD-YYYY
Control Point Approver - Comments	Blanket approval given for positions within budget.

The last question on the tab asks the Submitter to again verify that all approvals have been obtained prior to submitting the action to HR. If so, the Submitter should check the box as seen on the right.

By checking this box, filling in the above names and dates and submitting this action to HR, I certify that all necessary approvals have been received.

After all approvals have been obtained, the Submitter clicks **Preview Action** on the bottom of the tab or clicks **Continue to Next Page**.

**CONTINUE TO NEXT PAGE >>**



## Submit the Action

11. You are almost done! The last step is to do a final review of the action and check the appropriate **Action Status**. The action status tells the system what you want to do next. Are you ready to send it to Compensation? Select the **Submit New Career JD to Compensation** circle. Not yet ready to submit the New Career JD to Compensation for review? Select the **Save – Draft in Progress** or **Save for Department Review** circle.

[Edit](#)

If you realize at this point that you need to edit the action, click on the **Edit** link and you can go back into any tab.

After you have checked the **Submit New Career JD to Compensation** circle and clicked **Continue**, you will be asked to confirm your choice.

You are then given a confirmation message:

## Now you are done!

### Emails, emails, emails!

The moment you selected the action status *Submit New Career JD to Compensation*, automatic emails were sent to you, your Department's Reviewer(s) and the Compensation Analyst assigned to your department. If you have indicated that this job description is being created for purposes of a recruitment, the Compensation Analyst will expedite the review.

### A note about identical job descriptions

If you have multiple JD's to enter that have exactly the same duties, HR suggests that **you just enter one** to start with. After it's approved by Compensation and submitted to the Job Description Library, completing the rest of the employee job descriptions will be much easier! After selecting *the Submit New Career JD to Compensation* action status, contact your Compensation Analyst to indicate that you would like to use the **Search Job Duties to Copy** feature to create the rest of the job descriptions. The Compensation Analyst will expedite the review and approval of this job description so that it will be available to copy. You will get an automatic email when this is done.



## Limited Job Descriptions

If you are using the **Create a New Limited Job Description** action, the steps are almost identical to those in the “Career” action. There are two main differences to be aware of:

### 1) On the **Proposed Job Details Tab**:

<a href="#">Proposed Title</a>	<b>Proposed Job Details</b>	<a href="#">Search Job Duties to Copy</a>	<a href="#">Proposed Job Duties</a>	<a href="#">Action Justification</a>	<a href="#">Action Approval Steps</a>
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The “Appointment Type” selected should be *Lmtd Appt*.

Appointment Type:	Lmtd Appt
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Above the “General Summary” you will need to add the approximate dates of the Limited Appointment.

Limited Appointment Begin Date	<input type="text" value="07/01/2015"/>	MM/DD/YYYY -or- MM-DD-YYYY
Limited Appointment End Date	<input type="text" value="06/30/2016"/>	MM/DD/YYYY -or- MM-DD-YYYY

*\*Limited appointments can be extended as long as they are not going beyond the 1000 hour limit – these actions are submitted through the “Update a Job Description” action.*

### 2) On the **Action Status** menu:

**Action Status**

Save

Submit New Ltd. Appt JD to Compensation

Approve - Submit to JD Library (limited appt)

Cancel/Withdraw Action

- “Submit New Ltd. Appt JD to Compensation” is for any action that requires Compensation review. If you are in ANY way unsure of the classification level of a position, submit the action to Compensation.
- “Approve – Submit to JD Library (limited appt)” is for positions that are Grade 1 or below. Departments have been delegated the authority to approve limited appointment job descriptions only for those positions that meet this Grade requirement.

*Note: If you have a limited position that will convert to Career, the Job Description is REQUIRED to be reviewed by Compensation prior to the conversion. IF there is no compensation review, you must submit the JD to your Compensation Analyst.*

*Caution: Any actions that began using the Limited tool will always have the option to submit directly to the Library. Once an action has converted to Career, Compensation review of any additions/updates is required.*