UNIVERSITY OF CALIFORNIA, SANTA BARBARA
HUMAN RESOURCES • OACIS - ONLINE APPLICATION AND CLASSIFICATION INFORMATION SYSTEM

T U T O R I A L
Reclassify a Job Description using OACIS

User Name: [   ]
Password: [   ]
[LOGIN]

You are about to log in to a secure system. When you are finished, please click **Logout** to ensure that others with access to your computer cannot view the information in the system.

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.

(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.*)

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

Begin the Action

3. Next, go to the left side of the screen and click on the **Begin New Action** link.

4. Choose "Start Action" to begin the **Reclassify a Job Description** action.

Reclassify a Job Description
Start Action

5. You are then taken to a Search page. **Search** for the employee you would like to reclassify using any of the search options.

Action: Reclassify a Job Description

Search Job Descriptions to Begin Action On

Payroll Title	Any	First Name	
Title Code		Last Name	carlson
Department	Any	Emp Id #:	
Appointment Type:	Any	Working Title	
Provision Number			

[SEARCH] CLEAR RESULTS

In this example, we are searching for the last name of "Carlson."

You can sort the search results page by clicking on the arrows in any of the column headers.

Click **Start Action** underneath the employee's last name.

CARLSON
Start Action | View Summary

Choose Job Description to Begin Action On

1 Record

Employee Last Name	Employee First Name	Department	Payroll Title	Title Code	Working Title	Separation Date	Last Action	Appt Type
CARLSON Start Action | View Summary	STEVEN Get Reports List	PERS-Human Resources	ANALYST V	7238	ANALYST V		Job Description Update Approved View History	Career

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Printing the Current Job Description

Want to print the employee's current job description now, before you begin the reclass action? Click *Get Reports List* under the Employee's name, then click *Generate Report*.

▲ Employee Last Name	▼ Employee First Name	▼ Department
CARLSON Start Action | View Summary	STEVEN Get Reports List	PERS-Human Resources

6. Now you are in the **Reclassify a Job Description** action. The first tab is the **Current Job Description**. This is for your reference only. You are not able to edit this page.

Action: Reclassify a Job Description

Current Job Description	Proposed Title	Proposed Job Details	Search Job Duties to Copy	Proposed Job Duties	Action Justification	Attach Documents For Review	Action Approval Steps

This tab displays the present Job Description.

Employee Details

Employee First Name:	STEVEN
Employee Last Name:	CARLSON
Employee Id Number:	804673785

Position Title

Payroll Title	ANALYST V

Review the current verbiage and click **Continue to Next Page** when done.

CONTINUE TO NEXT PAGE >>

7. The next 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. Use the search options to select a title.

In this example, we have chosen the payroll title "Asst Mgr (Functional Area)" in the dropdown.

If you don't know what title to choose, select *0000* for "*Undecided.*"

Title Code	0000
CBU (Collective Bargaining Unit)	Any ◆

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

Action: Reclassify a Job Description

Current Job Description	Proposed Title	Proposed Job Details	Search Job Duties to Copy	Proposed Job Duties	Action Justification	Attach Documents For Review	Action Approval Steps

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 Compensation Analyst or select "0000, Undecided". **After you search for the title, you must choose "Select and Continue" below the title name.**

Search Titles to Assign to this Position

Payroll Title	ASST MGR (FUNCTIONAL AREA) ◆	Title Code	
FOC Code	Any ◆	CBU (Collective Bargaining Unit)	Any ◆

SEARCH **CLEAR RESULTS**

ASST MGR (FUNCTIONAL AREA)
Select and Continue

DO NOT SELECT A NE   / TITLE, CONTINUE TO NEXT PAGE >>

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Write the Proposed Job Description

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

The fields should be populated with the existing JD information. Review this information carefully and make any necessary changes to the job description.

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.

Most questions require entering in text or dates.

Action: Reclassify a Job Description

| Current Job Description | Proposed Title | **Proposed Job Details** | Search Job Duties to Copy | Proposed Job Duties | Action Justification | Attach Documents For Review | Action Approval Steps |

<< RETURN TO PREVIOUS   CONTINUE TO NEXT PAGE >>

*Required information is denoted with an asterisk.

Employee Details	
Employee First Name:	STEVEN
Employee Last Name:	CARLSON

To answer the physical, mental and environmental requirements questions, click on the circles.

Physical Requirements
Continuously=Activity occurs > 66% Frequently=Activity occurs 33% to 66% Occasionally=Activity occurs < 33% Not Applicable=Activity does not exist

		No Response	N/A	OCCAS.	FREQ.	CONTIN.
*	Stand	○	○	○	●	○
*	Walk	○	○	○	●	○
*	Sit	○	○	○	●	○
*	Bend	○	○	○	●	○

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

CONTINUE TO NEXT PAGE >>

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 a red *) on the page must be completed.

SAVE AND STAY ON THIS PAGE

9. 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 for the proposed job description, search for that employee here. If not, you can skip to the next tab.

If you want to keep the employee's current job duties and use those as your "starting point" for the revised JD, skip this tab.

Action: Reclassify a Job Description

| Current Job Description | Proposed Title | Proposed Job Details | **Search Job Duties to Copy** | Proposed Job Duties | Action Justification | Attach Documents For Review | Action Approval Steps |

This tab is OPTIONAL. If you would like to have the **employee's current job duties automatically appear** on the "Proposed Job Duties" tab, allowing you to edit as needed, click on the "Continue to Next Section" button below. If you would like to select **another employee's job duties to appear** on the Proposed Job Duties tab, use the search options below. Find that employee's Job Description, **click on "Select and Continue"**, then edit the job duties as needed.

Search Job Description Library

Payroll Title	Any	First Name	
Title Code		Last Name	
Department	Any	Emp Id #:	
Appointment Type:	Any	Working Title	

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10. The next tab is the **Proposed Job Duties** tab. On this tab, you will enter in the employee's new job functions and job duties. If you skipped the **Search Job Duties to Copy** tab, then you will see the employee's current job duties. If you selected another employee's job duties to copy, those will appear on this tab. You can edit or delete them as needed.

To add a new entry, click **Add New Entry**. To edit or delete an entry, click the **Edit** or **Delete** links underneath the job duty statement.

Action: Reclassify a Job Description

| Current Job Description | Proposed Title | Proposed Job Details | Search Job Duties to Copy | Proposed Job Duties | Action Justification | Attach Documents For Review | Action Approval Steps |

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.

If you are adding or editing a job duty, you will see a window like this:

Edit Entry
* Required information is denoted with an asterisk.

* Order of Importance	4
* Essential Duty?	Yes
* Percent of Total Time	5
Job Function	Policy Coordination and Oversig
* Frequency	Monthly
* Duties Performed	- Serves as policy coordinator for HR. Writes local policy. Researches, analyzes current policy and suggests changes. Issues policy changes and clarifications to campus; answers questions on policy related matters. Identified as point-person in HR and on campus for policy formulation. - Conducts training on policy matters. Creates training programs as needed.

SAVE CHANGES

CANCEL

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

After editing an entry, you will get a confirmation message:

✓ **The entry has been edited.**

Continue adding, editing or deleting 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.

The job description will be sorted according to what you have entered in the "Order of Importance" field. You can sort according to any of the columns by clicking the arrows.

| ▲ Order of Imp | ▼ Essen Duty | ▲ % | ▼ Freq. | ▼ Function | ▼ Duties |

Above the column headers, the system will keep track of the total percentage of time allotted so far.

Total Percentage of Duties: **100**

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

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Justify the Action

11. 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.

If the employee you are reclassifying has already left UCSB and you are submitting this action request in preparation for a recruitment, select "*Yes*" in the first dropdown field.

The rest of the tab has a variety of questions regarding the reclassification action. The Compensation Analyst will use your answers to help make their classification decision. Please answer them to the best of your ability.

Action: Reclassify a Job Description

| Current Job Description | Proposed Title | Proposed Job Details | Search Job Duties to Copy | Proposed Job Duties | **Action Justification** | Attach Documents For Review | Action Approval Steps |

<< RETURN TO PREVIOUS | CONTINUE TO NEXT PAGE >>

*Required information is denoted with an asterisk.

*	Is this action being performed for the pupose of a recruitment?	No
	Compensation Reviewer:	Williamson, Dayna

See something that looks like this?

| Reclass Questionnaire | http://hr.ucsb.edu/Compensation/Series/analyst_index.htm |

If a link appears next to the Reclassification Questionnaire, click on the link, download the form and save it on your computer. It should be filled out by the employee being considered for reclassification and attached to the reclassification request.

What is a Reclassification Questionnaire?
A reclassification questionnaire is a list of questions to help supplement a reclassification action request. The questions asked are specific to the particular job title you selected in th**e Proposed Job Title** tab. These questions help the Compensation Analyst properly classify the position and prevent the need for an amazingly long standard form. For instance, there are specific questions HR asks during a review of an Analyst job that are not asked for other types of reclasses. Rather than design an online form that would include all Analyst questions, the system presents a link to a specific form only when an Analyst title is selected on the **Proposed Job Title** tab.

Not sure you really need to fill out a questionnaire, even if a link appears? Call the Compensation Analyst for your department.

Who fills out the Reclassification Questionnaire?
In almost all cases, the Reclassification Questionnaires should be completed by the employee being reclassed. The Submitter should save the form on their desktop, send the form to the employee, and attach it to the action after the employee has completed it. (You can attach the form on the **Attach Documents for Review** tab. The instructions for this are coming up later.) The employee's supervisor should review the completed questionnaire to ensure that he or she agrees with the employee's answers.

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After the reclassification questionnaire link, there are a series of questions. Only the first question has the required red "*" by it, meaning that you can save the page but first need to fill in this question.

Even though the other questions are not "required" by the system, HR asks that you complete all of the questions that apply. If the proposed title you have selected requires a Reclassification Questionnaire to be filled out, a link will appear in the "Reclassification Questionnaire" field.

* Briefly explain the basis for the reclassification request:

List the **specific changes** that have occurred in this job. Please explain so the external reviewer can easily understand the job duties.

If scope, complexity, percent time or frequency has changed, but the duties are essentially unchanged, explain here:

This question helps the Compensation Analyst understand how the job may have changed, even if the duties may not reflect it.

If applicable, list what specific duties have been redelegated, and to whom:

This question helps the Compensation Analyst understand how this reclassification may impact others in the department.

We often ask this question during "desk audits". Having it on the online form gives the Submitter the chance to weigh in on possible campus comparisons even if a desk audit isn't necessary during the reclass review.

If you are aware of positions on campus that appear similar, list the employee(s) name, title and department

The employee's **current salary** and **current grade** or **current step** will appear at the end of the tab. This information is given to help you make the salary recommendation. We are asking for a salary recommendation upfront in order to help expedite the reclassification process.

The **PPS As Of Date** is the date that the above salary was last updated in OACIS.

| PPS Current Salary |
| Current Grade |
| Current Step |
| PPS As of Date |

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Have questions about the salary increase policies that may impact this employee's request? See the links provided.

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

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Recommended new Step or Grade:	
Recommended new salary: (Monthly Salary)	
or, Recommended percentage increase: Click here to read salary policies impacting NON-REPRESENTED employees Click here to read Collective Bargaining Unit contracts	

Attach Documents to the Action
12. Next is the **Attach Documents for Review** tab.

On this tab, you will attach a Revised **Organizational Chart** and a completed **Reclassification Questionnaire** (if applicable).

Action: Reclassify a Job Description

| Current Job Description | Proposed Title | Proposed Job Details | Search Job Duties to Copy | Proposed Job Duties | Action Justification | Attach Documents For Review | Action Approval Steps |

This tab allows you to attach documents as needed. Reclassification actions require an updated organizational chart. Some reclassification actions require a Reclass Questionnaire; if so, a link would have automatically appeared on the Action Justification tab. If no link appeared, you are not required to attach a Reclass Questionnaire.
3 Records

Attach / Remove	Document Type	Attached Document ('Type'_'Date'_'Time')	View Document
Attach	Organizational Chart	Not Attached	
Attach	Reclass Questionnaire (if applicable)	Not Attached	
Attach	Memo (optional)	Not Attached	

To attach the organizational chart, click the **Attach** link (located to the left of the words *Organizational Chart).* Be sure that you know where it is saved on your computer.

Upload the Organizational Chart by browsing your computer and finding the file. Click the **Browse** link, find the file on your computer, then click the **Attach** link. Click **Confirm**. Your attachment has been added as a PDF file. You may view the attachment by clicking on the **View** link.

Please choose one of the following methods to associate a document.

Upload a new document:
Browse below to select a document to associate.
File: [_____] (Browse...)

A mac user? The system asks you to select the correct file type.

Macintosh Users: Please select the correct file type from the dropdown below.
File type: [Microsoft Word ▼]
ATTACH

Follow the same process to attach a Reclassification Questionnaire.

Why does HR need to see an Organizational Chart?
Every Reclassification Action should have a revised **Organizational Chart** attached. This is important, as the Compensation Analyst needs to know how the reclassification may have impacted the organizational structure of the department. In particular, the Analyst is looking to see if the reclassification may need to review the classification or request an updated job description for another employee in the Department. It is also helpful for the Analyst to see the type and level of supervision for the employee being considered for reclassification.

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What types of attachments will the system accept?

You can attach documents in the following formats:

PDF	Visio
Word	Powerpoint
Excel	

When you are done attaching documents, click **Continue to Next Page**.

CONTINUE TO NEXT PAGE >>

Approve the Action

13. The last tab is **Action Approval Steps**. At this point, if you do not yet know your department's approval process for Reclassification Requests, 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***.

How do I find out what my department's approval process is?

Ask your Supervisor, MSO or Department Head. In order to give maximum flexibility to campus departments, HR has <u>not</u> dictated a single way that all campus should approve JD actions. For instance, one Department Head or Vice Chancellor may delegate authority for approving new JD's to the Supervisors. Another Department Head may require all approvals be routed through her before anything is submitted to Human Resources. It is also possible that a Vice Chancellor may require his office's approval before newly created job descriptions or reclassification requests are submitted to HR for review. The bottom line? It varies. The Submitter is responsible for learning the appropriate process. *The system requires that the Submitter record what approvals were received AND check the box indicating that they have followed their internal department approval process.* Questions? Ask your Supervisor, MSO, or Department Head.

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.

Action: Reclassify a Job Description

Current Job Description	Proposed Title	Proposed Job Details	Search Job Duties to Copy	Proposed Job Duties	Action Justification	Attach Documents For Review	**Action Approval Steps**

<< RETURN TO PREVIOUS | CONTINUE TO NEXT PAGE >>

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. **Supervisors must learn what their approval process is before submitting the action request to Compensation**.

To obtain approvals, you may either print a hardcopy of the action request or ask the person responsible for the approval to follow the instructions for online review.

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".

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.

[Yes ▲▼]

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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, the Control Point (Justine Burkess) gave her approval via email. The Submitter made a note of this for his own records.

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

Department Approver - Name	Mary Jane McFarley
Department Approver - Date	04-30-2005 MM/DD/YYYY -or- MM-DD-YYYY
Department Approver - Comments	
Control Point Approver - Name	Justine Burkess
Control Point Approver - Date	05-02-2005 MM/DD/YYYY -or- MM-DD-YYYY
Control Point Approver - Comments	Approved via email

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

14. 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 Reclass to Compensation** circle. Not yet ready to submit the reclass to Compensation for review? If you are still working on it, click **Save – Draft in Progress**. If you would like someone in your department to review it, click **Save for Department Review**.

Edit
Action Status
○ Save - Draft in Progress
○ Save for Department Review
● Submit Reclass to Compensation
CANCEL CONTINUE

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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.

Edit

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

Action Status

Submit Reclass to Compensation

GO BACK CONFIRM

You are then given a confirmation message:

Pending Actions

✓ The status of Action has successfully been changed to **Submitted to Compensation-Reclass**.

Now you are done!

Emails, emails, emails!

The moment you selected the action status *Submit Reclass 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 reclassified for purposes of a recruitment, the Compensation Analyst will expedite the review.