



# TUTORIAL

## Creating a Temporary Stipend 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.

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.

• 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. The "new action" you will begin is **Temporary Reclassification/Stipend Request**. Select "Start Action" to continue.

- JOB POSTINGS**
  - VIEW OPEN
  - VIEW PENDING
  - VIEW HISTORICAL
  - SEARCH HIRING PROPOSALS
- CREATE REQUISITION FROM JOB DESCRIPTION**
- USERS**
  - CREATE USER ACCOUNT
- JOB DESCRIPTIONS**
  - BEGIN NEW ACTION**
  - PENDING ACTIONS
  - HISTORICAL ACTIONS
  - JOB DESCRIPTION LIBRARY
- ADMIN**
  - HOME
  - CHANGE PASSWORD
  - CHANGE USER TYPE
  - LOGOUT

**Temporary Reclassification/Stipend Request**  
[Start Action](#)

4. Now you are in the **Temporary Reclassification** action. (Please note, we no longer use these actions for Temporary Reclassifications – all actions will be processed under a Stipend.) The first tab is the **Search Job Description to Reclassify** tab. Use the search options to find the employee that you are recommending a stipend for. **Do not change the title code; Temporary Stipends maintain the employee's existing title code.**

Search Job Description to Reclassify

Proposed Job Details | Proposed Job Duties | Action Justification | HR Approved Title | Attach Documents For Review | Action Approval Steps | Action History

Search Job Descriptions to Begin Action On

Department: Any | Last Name:

Title Code:  | First Name:

Payroll Title: Any | Emp Id #:

Working Title:  | Appointment Type: Any

Provision Number:  | CBU (Collective Bargaining Unit): Any

**SEARCH** | **CLEAR RESULTS**

**CONTINUE TO NEXT PAGE >>**

**SAVE AND STAY ON THIS PAGE**

For instance, you can enter the employee's last name in the appropriate field and select search.

Find the appropriate name on the list and click **Select and Continue**.

**Employee Last Name**

**Arnold**

[Select and Continue](#) | [View Summary](#)



## Write the Temporary Stipend Job Description

5. The next step is to complete the **Proposed Job Details** tab. The incumbents existing job description details are pulled from their current job description. The existing details should remain the same, and you will be adding the new information that pertains to the stipend action.

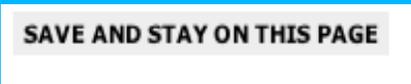
*	Indicate the BEGIN date of the temporary assignment:	<input type="text"/>	MM/DD/YYYY -or- MM-DD-YYYY
*	Indicate the END date of the temporary assignment:	<input type="text"/>	MM/DD/YYYY -or- MM-DD-YYYY

Under **Position Information**, you will need to enter the Beginning and End dates of the temporary responsibilities. These dates are required on all Temporary Stipend actions.

*	<b>General Summary of Job Duties and Responsibilities</b>	<p>Develops new programs, policies or procedures for implementation.</p> <p>General instructions may be provided on new assignments and initiatives. Demonstrates good judgment in selecting methods and techniques for obtaining solutions.</p> <p>Temporary Duties:          As the Subject Matter Expert for Wage Implementations, prepares documentation on existing processes, identifies best practices, and works with the Project Management team to identify necessary process changes under the new UCPath payroll system.</p>
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Enter a new paragraph in the **General Summary** section designating the overall nature of the temporary work associated with the Stipend.

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."



6. The next tab is the **Proposed Job Duties** tab. On this tab, you will add a function (or more than one if necessary) for the temporary duties associated with the stipend.

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>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 <a href="#">here</a>.</p> <p>When you are finished adding your entries, you may go to the next page by clicking "Continue to Next Page".</p> <p>To Add A New Entry: Click the <b>Add New Entry</b> button.            To Edit An Entry: Click the <b>Edit</b> link for the specific entry.            To View An Entry: Click the <b>View</b> link for the specific entry.            To Delete An Entry: Click the <b>Delete</b> link for the specific entry.</p>					

To add a function, click the “Add New Entry” button at the bottom of the page.

This will open a new entry box at the very bottom of the page. Enter the required information in each field. You can copy/paste from a word document or type directly into the field. The function should make clear that these are temporary duties associated with the stipend.

Click **Add Entry** when you are finished.

Continue adding new entries until you are done adding temporary functions to the job description.

When you are done entering the Temporary functions, your Total Percentage of Duties will be greater than 100%. You will need to **Edit** the percent’s associated with the ongoing functions so that your total percent is equal to 100%. If a function is not going to be performed during the time that the incumbent is working on the temporary duties, do not delete this function – just change the % to zero to show that they will not be performed during this timeframe.

You can also change the Order of Importance to reflect the correct importance of functions during the temporary change to their work.

You may edit your entries by clicking the **Edit** link. Need help writing the job description? Click on the **Help** link on the top of the tab.

Remember, 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

7. The next tab is the **Action Justification** tab. On this tab, you will provide information about the action that will help HR verify how the proposed action qualifies under the Temporary Stipend policy. Include any details that will help the Compensation Analyst understand where the work is coming from, how the employee’s ongoing work will be handled during the temporary interim, the rationale behind change in work, and the amount of the requested Stipend.



Recommended new salary:	<input type="text"/>
Non-Exempt - Hourly	
Recommended new Step or Grade:	<input type="text"/>
or, Recommended percentage increase: <a href="#">Click here to read salary policies impacting NON-REPRESENTED employees</a>	<input type="text"/>
<a href="#">Click here to read Collective Bargaining Unit contracts</a>	
Have you considered the impact of the above salary increase on other employees in your department?	Yes ▾

Complete the request for the amount of the stipend by either designating a new rate in the **Recommended new salary** box, or a % increase in the **Recommended percentage increase** box.

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

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### Attach Documents for Review

8. If there is additional documentation (Org Chart, Approval Memo, additional detail regarding the stipend action, etc.) you can attach documents to the action using the **Attach** links on this tab.

### Approve the Action

9. The last tab is **Action Approval Steps**. At this point, if you do not yet know your department's approval process for Temporary Stipend Job Descriptions, find out now. As a Submitter, you are responsible for making sure that your internal department approval process is followed.

**Action: Create New Career Job Description**

Proposed Title	Proposed Job Details	Search Job Duties to Copy	Proposed Job Duties	Action Justification	Action Approval Steps
<< RETURN TO PREVIOUS <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.	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, 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

10. 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 Temp Reclass/Stipend 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.

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 Temp Reclass/Stipend 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 Temp Reclass/Stipend 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.

## Extend, Inactivate or Update Temp. Reclass/Stipend

11. You can make changes to an existing, approved stipend action using the **Extend, Inactivate or Update Temp Stipend** action on the **Begin New Action** page of OACIS.
- Extend a Stipend:** Simply extend the dates on the **Proposed Job Details** tab, and provide justification for why the action is being extended on the **Action Justification** tab. On the **Action Status** page under **Preview Action**, select the **Submit to Compensation-Temp Reclass/Stipend Update or Extension** status.
  - Update a Stipend:** Make changes to the job description, summary, functions, or any other areas of the job description while keeping the stipend active. Complete the justification for why you are making changes to the stipend job description on the **Action Justification** tab, and on the **Action Status** page under **Preview Action**, select the **Submit to Compensation-Temp Reclass/Stipend Update or Extension** status.
  - Inactivate a Stipend:** End a stipend prior to the original end date. Change the end date on the action, note the reason for the change on the justification tab, and on the **Action Status** page under **Preview Action**, select the **Temp Reclass/Stipend Expired-JD Inactivated** status.