

## Creating a Merit Position Description Job Aid

**Purpose:** When creating a Merit Position Description (PD) in People Admin 7, use this as a guide to complete the required and optional forms and fields. Reference the **Creating a Merit Position Description Quick Reference Guide** or **Writing a Position Description Job Aid** for information on the process of creating a Merit PD.

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### New Position Description

This section provides basic details regarding the new position you are requesting. Use the tables below as guidance for each field.

New Position Description	
Position Title	The position title should be the University Title for the desired Classification (e.g. Secretary II or Clerk IV).
*Division	These fields will be pre-populated based on PeopleAdmin account access. If there is a need to create a PD in a department unavailable based on user access, please contact UHR Class/Comp.
*College/Unit	
*Department	

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### Action Justification Section

This section will provide written guidance for each form/field in the Action Justification section of a PD.

Position Justification	
*Are you going to fill this position?	If posting this position, select yes.
*Justification for Action	Explain why this position is being added or the current need for this position.
Multiple Position Advertisement	
*Are you filling multiple positions from one posting?	If hiring more than one position from this posting, please select Yes.
Additional Position Numbers for Multiple Position Advertisement	Enter PD numbers of all positions to be filled on this vacancy, if available.
Position Recommendations	
*University Title Recommendation to UHR	Type the classification for which this PD is created. Please note, UHR has the final determination of each PD/Classification at Iowa State University.

### Classification Selection

This section provides basic details regarding the classification (e.g. Custodian or Clerk IV) requested, such as University Title, Pay Grade, and Required Qualifications. Use the filter to limit results.

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### Position Details

This section provides basic details regarding the new position requested. Use the table below as guidance for each field. If cloning an existing position description, complete that first.

Classification Selection	
This area is pre-populated based on classification selection.	
Position Details	
*Position Title	The position title should be the formal university title (e.g. Clerk IV).
Position Number	This field will be generated by the system once it is routed for approval. Formats include: P&S : PS##### Merit : M##### Faculty : #####
Appointment Type	Make the appropriate selection. This is an editable field that will be carried over to the posting and hiring proposal.
Base of Employment	Make the appropriate selection. This is an editable field that will be carried over to the posting and hiring proposal.
*Confidential Position	A confidential position is exempt from the collective bargaining agreement as defined in Chapter 20 of the Iowa Code.
*Pay Frequency	Monthly or Semi-Monthly
*Number of Months Employed per Year	1-12 months or select semester
Location (if other than Ames)	Fill this out if the position will work in a location outside of Ames a majority of the time.
Work Unit	See Index: Work Unit below for guidance.
*Summary of Duties and Responsibilities	Reference <i>Writing a Position Description Job Aid</i> for detailed writing guidance.
Hiring Manager	The hiring manager (HM) can be a supervisor(s) or manager(s) of this PD. The HM will gain view/edit access to this PD.
Previous Incumbent	Previous employee seated in the position description
Job Duties	
Job Duty Label is used to label major functions of the job. A minimum of three builder entries are required, including one that must read 'Other duties as assigned – 5%.'	
*Job Duty Label	Reference <i>Writing a Position Description Job Aid</i> for detailed writing guidance.
*Description of Job Duty	
*Percent of Time	Typically, job duties should be no more than 45%. The percent of total time must add up to 100%.

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<b>Supervision</b>	
<p>This section is to be completed for positions that supervise AFSCME staff members. To be eligible, the supervisor must have the authority to hire; discipline; sign the performance evaluation; terminate; train; assign work; and check work of those they supervise. Please indicate all university titles this position supervises and the number of individuals in each title.</p>	
University Title of Positions Supervised	
Total Head Count Per University Title	For example, enter 2 if this PD is supervising 2 Clerk I's. Add a new entry for each University Title supervised.
Total FTE Supervised Per University Title Selected	For example, although there are 2 positions supervised, the FTE might equal 1.2 FTE.
Hire	Answer Yes or No to the question in the drop-down menu.  If no supervisory activities are assigned or allocated to this PD, remove entry.
Discipline	
Sign Evaluation	
Terminate	
Train	
Assign Work	
Check Work	
<b>Equipment/Software</b>	
Category of Equipment/Software	Select a category from the available drop-down menu.
Percent of Time During Average Day	For example: 90%
Is use of this equipment/software essential or non-essential?	Non-Essential should be indicated if the equipment could be removed and the position still able to complete responsibilities.
If essential, please list task specific equipment and reason for use.	For example: Each day the incumbent will need to use the listed equipment to coordinate with external vendors.

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### Complexity

Please indicate total percent of time spent supervising	Enter the amount of time overseeing incumbent's work.
Describe the nature of your responsibility for money, machines, equipment, and supplies.	Examples may include petty cash drawer or payments, machines such as: <i>Responsible for petty cash of over \$43,000 which includes the main safe balance, the safe balances at the 22 venues and the vending machine balances.</i>
What loss can occur through an honest error? Losses include both dollar outlays and non-monetary or human considerations.	Describe the scope and scale this position is allowed to make an honest error such as: <i>Lost revenue may occur if sales aren't properly charged. Theft may occur if cash isn't properly secured. Equipment costs may be incurred if repair or replacement is required.</i>
Records and reports: What records or reports do you prepare which require you to gather, analyze, and summarize data?	List reports and records this position will be responsible to maintain and/or create.
What is the source of the data for the records or reports?	The purpose of the records and reports.
Does the position require work knowledge beyond the duties of this job? If so, state examples below.	See <b><i>Writing a Position Description Job Aid</i></b> for more information
Work in own department	Describe work done within the hiring department.
Work in other departments	Describe work done outside the hiring department that may fall within the employee's job duties.
University policies	Policies that may affect the employee.

### Personal Interaction

Describe the interaction this position will have with different groups of people. These may include faculty, staff, deans, students, etc.

### Essential Physical Function

This section is used to determine the physicality of a position. This section will be used to ensure candidates are qualified and serve as a reference for an employee's ongoing need to perform the job. Be sure to take time and select the most appropriate response for the position. A tool is available to provide to supervisors if the Essential Physical Functions are unknown on the project website.

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### Qualifications, Required/Preferred Licensure(s)/Certification(s)

Reference Writing a Position Description Job Aid for detailed writing guidance.

### Verification

Although no fields in this section are required, it should be completed during the routing and approval process. By typing in your name, you are certifying the requested action.

### Posting Position Details

Complete the details regarding the position, such as whether this position is full or part time.

*Advertised Employing Department	Use department name (e.g. English) as opposed to department number.
*Full or Part time	Full/Part-Time.
*Fraction	Used toward FTE total.
*Shift	1 <sup>st</sup> , 2 <sup>nd</sup> , 3 <sup>rd</sup> , Rotating
*Work Schedule	Please indicate the work schedule and include days off. If rotating schedule, please indicate frequency of rotating schedule.
*Number of Hours per Week	10-40 hours
Additional information	Please note any important characteristics regarding any of the fields in the Posting Position Detail section.
Posting Admin	The Posting Admin will review and manage the posting to be created from this PD. The Posting Admin will also rate and route applicants for interviews and start the hiring proposal.

### Budget

*Account	The account number is to provide decision makers information about where funding for this new position salary is to be encumbered. Seven-digits, no dashes.
Sub-Account	Six-digits, no dashes.
*Account # % (1-100)	1-100%. Please note, the system does not calculate so be mindful when calculating percentages.

### Recruitment Planning – Posting Details

*Is this posting for external, internal (to ISU), or waiver of advertisement?	Choose the advertisement method from the drop-down menu.
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Business Rationale for internal posting or waiving advertisement	If the method is internal or is waived from external advertisement then provide rationale.
For waiver, name of intended hire(s)	If waived enter the planned candidate's name.
List the recruiting resources the department intends to further advertise the posting. The position will automatically be posted on iastatejobs.com and the Iowa Workforce website. Additional advertising is the responsibility of the hiring department.	<ul style="list-style-type: none"> <li>✓ ISU Employment Opportunities Website</li> <li>✓ ISU Employee</li> <li>✓ Website (other than ISU Employment Opportunities)</li> <li>✓ Placement Office</li> <li>✓ Trade Journal</li> <li>✓ Newspaper</li> <li>✓ Other</li> </ul>
Indicate which specific website, placement office, trade journal, newspaper or other resource that you intend to use.	This field will pre-populate in the posting, but is later editable.
*Department Contact Name	This department contact will be used by UHR when approving the PD and also be posted as a contact for applicants.
Department/Unit Website	Departments/Units can provide links to their specific URL to provide applicants a better idea of their potential work unit.
*Do you want this posted longer than the required advertisement period on iastatejobs.com?	The required advertisement period is noted in the Open Search Policy.
If yes, how many calendar days would you like the posting to appear on the web?	Enter calendar days (e.g. 15) you would like to appear on the web. Alternatively, enter the date you would like the posting to be taken down.
<b>Background Check</b>	
What type of background check would you like to conduct?	<a href="http://www.hrs.iastate.edu/hrs/node/327">http://www.hrs.iastate.edu/hrs/node/327</a>
Rationale for a credit check	Enter rationale for a credit check, as most candidates do not receive this type of background check.
*Account for background check charge	Account will be charged when the background check is run. Seven-digits, no dashes.
Sub-Account for background check charge	Six-digits, no dashes.

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### Supplemental Questions

**IMPORTANT NOTE:** There is a system issue currently for Supplemental Questions. Please do not use this section. Until this issue is fixed, **please upload a Word Document of desired supplemental questions** to the Position Documents section.

**Adding New Supplemental Questions:** Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing question or create a new one.

**Adding Existing Supplemental Questions:** There are two ways to search for approved supplemental questions to add to the job being posted. You can filter using the key word search or filter by question category.

**Assign Points or Disqualifying Responses:** Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the supplemental question.

**Supplemental Question Options:** Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

### Applicant Documents

Indicate applicant documents that will be required, optional, or not used on the posting. Optional and Not Used documents can be reviewed and updated at the time of posting approval. Be sure to update Application Instructions (on the posting) if selecting "other documents."

### Supervisor

Use this section to assign a PD/Supervisor to this position. Use the option to filter the results to find a specific position type, department, or PD number.

### Position Documents

Upload an organizational chart here. Position Documents are not advertised with the posting. These documents are only accessible to those who can view this PD, including the incumbent. Examples include: relevant emails or communications regarding this position and/or reclassification. Reference, Writing a Position Description Job Aid, for detailed organization chart guidance.



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### INDEX: Work Unit

A work unit is best described as an area where an employee, or unit or team of employees, has been assigned to accomplish specific position responsibilities. Area can refer to:

- a physical location such as an office space, building or group of buildings and/or
- a rotating post or relief post as well as simply a supervisor or group of supervisors.

Careful consideration must be given when defining a work unit due to the impact on a department's ability to manage its work and employees. Work units identified by the department will be reviewed when analyzing whether a workforce reorganization plan or a new posting is needed.

Departments are not required to create a specific work unit. Where one does not exist, the department is the work unit.

Below are some examples of existing work units:

Department	Classification	Work Unit
FP&M	Custodian I	Team 10
VDL	Laboratory Technician III	Serology
Campus Dining Services	Cook I	Seasons Dining Center