How to Create a Position Description Last Updated 12/05/2023

1. Log into Cardinal Talent by logging onto Cardinal Apps by going to: https://apps.uiw.edu/ and select "Cardinal Talent".

Adobe Sign	Argos	E9 AdminPages (VPN required if	Banner 9 Time Entry	Canvas LMS	Cardinal Talent	EGRFE WORKS DegreeWorks Degree Audit
CashNet ePayment Center	Excel	: LinkedIn Learning		OneNote	: Outlook	PowerPoint
RingCentral	SchoolDude Facilities Work	Eams	Transact eAccounts	HELPJESK UIW Helpdesk	Word	: Medith services UIW Health & Wellness Hub

2. When logging in, ensure you are in the correct user group by reviewing the user group selection in the top right-hand corner.

Welcome, Paula Casiano	<u>My Profile</u>	<u>Help</u>	logout	:
	User Group:			
	Human Res	sources	~	
	Employee			
	Human Res	ources		
	Level 1			
	Level 2			
	Level 3			

User group access will differ for each user. Level 1, Level 2, Level 3, and Division Head users have access to create postings.

Types of Access Levels in Cardinal Talent:

Divisional Head

• Respective VP or Provost that approves the division

• Note that some division heads may have others as assigned approvers, such as Associate Provosts for the Provost

• Able to see all postings & position descriptions for assigned division

• After a Division Head approves a job posting, it is moved to VP Finance/Budget Office for approval then HR

Level 3

- One step away from the divisional head level
- For academic departments, this is the dean level
- For others, typically a director level or higher that directly reports to divisional head

• Able to create and see all existing postings & position descriptions for assigned depts/schools

• After Level 3 approves a job posting, it is moved to Divisional Head for approval

Level 2

- Two steps away from the divisional head level; one step away from Level 3
- Various titles can be assigned as Level 2

• Able to create and see all postings & position descriptions for assigned dept/school

• After Level 2 approves a job posting, it is moved to Level 3 for approval

Level 1

• Three steps away from the divisional head level; two steps away from Level 3; one step away from Level 2

- Various titles can be assigned as Level 1
- Able to create and see all postings & position descriptions for which access has been specifically assigned within the

dept/school

• Where access to current or prior posting &/or position description is needed, HR must be contacted so that such access can be assigned. New position descriptions should <u>not</u> be created if there is an <u>existing</u> position description that can be used/modified.

- After Level 1 approves a job posting, it is moved to Level 2 for approval
- 3. After ensuring the correct user group is selected, click on the three blue dots located in the top left-hand corner.



4. From the menu, select the option "Position Management."

••• Applicant Tracking System	
Applicant Tracking System	ENT
Position Management	
, m	
OTHER TOOLS	Talent
Cardinal Talent Employee Portal	
Analytics Dashboards	Postings

Once selected, your top menu will turn orange, as pictured below:

•••	Position Manage	ement						
	💎 CAR	DINAL TALENT						
	Home	Position Descriptions -						
	Welcome to	o Cardinal Talent						
	Inbox		Postings	Users 83	Hiring Proposals	Position Requests 5	Onboarding Tasks	Special Handling Lists
	SEARCH	no results to be displayed.						Filters

5. Select the "Position Descriptions" tab and select the type of position description that will be created.



- Note that each position type has two similar categories.
 - The first category refers to <u>HR-approved</u> positions.
 - The second category that ends with, "Position Request," refers to <u>pending or in-process-of-approval</u> position descriptions. Pending position descriptions occur when a *new* position description is created or a *modify* is requested to an existing position description.
 - Note that position description requests require the review and approval of HR.
- 6. Once the position type is selected, position descriptions will populate on the next screen as pictured below:

ome Posi Position Descriptions	tion Descriptions -						
Position Descriptions		Classifications -				Shortcut	5 -
	/ Administrator / Staff ぢ	5					
\dminist	rator / Sta	ff Position D	escriptions		+ Crea	ate New Position Descrip	tion
Saved Searches			Search Q Hide	Search Options 🗸			
	Add Co	UMD: Add Column		~			
	Depart	ment: Department					
	Position Description S	itatus: ×Active					
	Outstanding Ac	tions: Select outstanding action	s	✓			

Note: Level 1 users can only see position descriptions for which they have been specifically assigned access. If you are a Level 1 user and need access to a position description that is not visible, contact Human Resources for assistance.

7. On the top right corner of the screen, select the orange button that says Create New Position Description as pictured below:

User Group: Human Resources	~	
Shortcuts -		
+ Create New Position Description		

8. A new page will be displayed to start creating the position description. On this page, you must complete the fields of *Position Title, Division*, and *Department* as pictured below:

5	New Position Description		Cancel Start Position Request
		To create a new Position Description, select a title and Organizational Unit. Select a Position Description below to clone from an existing Position Description.	
	Position Title *		
	Organizational Unit		
	Division *	Select a Division	
	Department *	Select a Department ♥	
Saved S	Searches 🗸	Search Q More Search Options ~	

Once this data is entered, you have two options- (a) create a position description from scratch or (b) clone/copy an existing position description. We will first cover creating a position description from scratch. If you are interested in cloning/copying an existing position description, skip to step 8b.

8a. Creating a Position Description from Scratch

The system will move you through the four (4) distinct parts of the position description. Each has its own heading as identified below under the heading, "Editing Position Request." The table to the right explains each menu part.

Menu option 1- Classification Selection

Editing Position Request	
Classification Selection	
Position Details	
Supervisory Position	
Optional Position Docu	
Position Request Summary	

Classification	This section is primarily used to identify a position as exempt or
Selection	non-exempt. If you are unsure of the appropriate classification
	leave it blank.
Position	This section is composed of a position summary, job duties,
Details	knowledge, skills, abilities, required education and experience,
	work hours, etc
Supervisory	This section is where you identify the supervisor of this
Position	position. The assignment of a supervisor is critical to
	performance management.
Optional	UIW does not currently use this section.
Position	
Documents	
Position	This section is where you can review all entries and move the
Request	position request <i>draft</i> to another level, typically HR, for review
Summary	and approval. Note that once it is approved, the status will
	change from <i>draft</i> to active.

Next, select the classification for the position description you are creating.

Classification Selection				Save Save & Continue
Classifications - Filter these results				
Classifications 🗙 "	Classifications" (20 × Delete this search?			
		← Previous 1 2 3 4	$Next \rightarrow$	
	Classification Job Title	Classification Status	FLSA	(Actions)
0	Account Representative	Approved	Non-Exempt	Actions ~
0	Accountant	Approved	Exempt	Actions 🗸
0	Accountant	Approved	Non-Exempt	Actions 🗸

Enter a keyword to find the classification associated with the position description. Examples: assistant, director, specialist, coordinator, etc....

Search Class	ifications	×
Assistant		Search
Add Column:	Add Column	~
Title Status:	Title Status	
		Search Cancel

While creating the position description, remember to "Save & Continue" when moving forward throughout the process. Note that the system will time you out after 15 minutes of inactivity.



Menu option 2- Position Details.



Position Information Field

• Start by entering the Position Summary as shown below. Note that the Position Title will auto-populate based on your initial title selection.

Classification Information

Classification Title Administrat	ive Assistant
----------------------------------	---------------

FLSA Non-Exempt

Position Information

*	Position Title	Office Assistant
*	Position Summary	B I S Ø T II ↔ E E E E F ~

This field is required.

Job Duties

• Every position description must have a list of expected job duties. Note that a position description is not expected to include every single job duty.

*Job Duties

This is a required entry.	Click 'Add Job Duties Entry' button to add job duties
---------------------------	-------------------------------------------------------

* Job Duty Name	Essential Duties
	B I 5 8 T " + H = E E K ~
* Description of Job Duty	Enter the description of duties.
Remove Entry?	
	Add *Job Duties Entry

Other Fields

• Enter respective information in each of the remaining fields.

Position Information Continued

	Department	Huma	in Res	source	25									
		В	I	÷	8	τT	99	$\langle \rangle$	ΙΞ	Ξ	4	5	5	\sim
	Knowledge Skills and Abilities	Ente	r KSA	s										
		В	I	÷	8	π	77	$\langle \rangle$	i≡	ì	Œ	>	ŝ	α
*	Required Education	Req	uired	Educ	ation									
		This f	field is	s requ	ired.									
		В	I	÷	8	τT	99	<>	i≡	١	<u> </u>	2	ŝ	0
*	Required Work Experience	Req	uired	Work	Expe	rience								
		This	field is	s requ	ired.									

	B I \$ 8 ∏ ₩ ↔ \\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \
Preferred Qualifications	Preferred Qualifications.
	B I 5 8 T ™ ↔ ☷ ☷ ☲ ☲ ☞ ~
Required Certifications, Licenses or Registrations	List if <u>needed</u> .
Work Hours	Work Hours.
Physical Demands	Physical Demands.
Level 1 Access	Casiano, Paula (pcasiano) ×

Reminder-assign your level 1 user(s) at this time, if applicable.

Menu option 3- Supervisory Position (identification of supervisor)



• To find the correct supervisor for the position, use "*Filter these results*" to help narrow the search as pictured below. Note that both name and title are shown in the search.

Supervisory Position

Pos	ition Descript	ions - Filter these n	esults												
A	dmin/Staff JD	×	"Admin/Staff JD" 12	77 × Delete this	search? ← Previous 1	2	3	4	5 6	5 7	8	9	 42	43	Ne
		Classification Title	Position Title	Department	Supervisor	Last	Nan	ne	F	rst N	ame		Statu	5	
	0	Coordinator	Payroll Coordinator	Payroll	Payroll Manager (Christine O'Donnell)								Active	!	
	0	Technician	Accounts Payable Technician	Accounts Payable	Accounts Payable Manager (Melba Huerta)	Rios				Jaco	ueline		Active	ł	

• You can search for the supervisor by first/last name, full name, or title. Note that you may need to adjust the position type field to find the respective supervisor. Example: if

the supervisor is a faculty member adjust the position type to faculty; if an executive, such as a dean, adjust the position type to executive. If you cannot find the supervisor you are looking for, contact your HR recruiter for assistance.

Search Posit	ion Descriptions	
		Search
Position	Administration (Sheff M	
Type: Add	Administrator / Staff *	
Column:	Add Column	`
Department:	Department	
Position		
Description Status:	×Active	
Outstanding		
Actions:	Select outstanding actions	~
		Search Cancel
50000	01	5

• Once you have found the supervisor for the position, select as pictured below.

Admin/Staff JI	D	Ad hoc Sear	ch	× Ad hoc Search				
	Classification Title	Position Title	Department	Supervisor	Last Name	First Name	Status	Division
۲	Recruiter- Staff	Recruiting Coordinator	Human Resources	Recruitment Manager (Diane Mazuca)	Casiano	Paula	Active	Legal Affairs and General Counsel

Menu option 4- Optional Position Documents (skip as UIW does not use this option)

Editing Position Request	
Classification Selection	
Position Details	Optional Position Documents
Supervisory Position	
Optional Position Docu	PDF conversion must be completed for the document to be valid when applicable.
Position Request Summary	Organizational Chart

Menu option 5- Position Request Summary

• This will take you to the main page and will allow you to review all parts of the position description.

• Select the "Take Action On Position Request", as pictured below, and select the option "Submit to HR (move to Human Resources)," unless you are in a health professions department that requires full routing approval for position descriptions.

Keep workin	ng on this Position
Request	
WORKFLOW ACT	IONS
Cancel Draft	(move to Canceled)
(Optional) R	eviewed For Level 2
(move to Lev	vel 2)
Submit to H	R (move to Human
Resources)	0

8b. How to Clone/Copy an Existing Position Description

Sometimes it makes more sense to clone/copy an existing description that is most *similar* to the position you wish to create and then make small edits. When you use this option, the system will populate the data from the cloned position into the new position with the ability to edit all fields. Note that you are only able to clone a position to which you have access. If you do not have access to the position you wish to clone, contact your HR Recruiter for assistance. Be sure to identify the dept, position name, and person (if applicable) that is currently seated in the position you wish to clone.

- To clone an existing position, you can either (a) scroll to the bottom of the page and find the position you wish to clone or (b) enter the title or seated incumbent's name in the search bar and select the search button.
- Find the position you wish to clone, then hover on the Actions button located on the far right of the row:

Admin/Staff Jl	D	×								
"Admin/Staf	fjd" (1277) 🗙	Delete this sear	ch?							
			$\leftarrow Previous$	1 2 3 4	5 6 7 8	3 9 42	43 Next \rightarrow			
	Classification Title	Position Title	Department	Supervisor	Last Name	First Name	Status	Division	Created Date	(Actions)
0	Coordinator	Payroll Coordinator	Payroll	Payroll Manager (Christine O'Donnell)			Active	Legal Affairs and General Counsel	October 21, 2014 at 05:32 PM	Actions 🗸
0	Technician	Accounts Payable Technician	Accounts Payable	Accounts Payable Manager (Melba Huerta)	Rios	Jacqueline	Active	Finance & Administrative Services	October 21, 2014 at 05:32 PM	Actions 🗸
0	Technician	Senior Accounts Payable Technician	Accounts Payable	Accounts Payable Manager (Melba Huerta)			Active	Finance & Administrative Services	October 21, 2014 at 05:32 PM	Actions 🗸
0	Advisor	Academic Advisor I	School of Professional Studies	Associate Director of Advising and Tutoring Services (Tina Siller)	Salinas	Lorynn	Active	Academic Affairs & Provost	October 21, 2014 at 05:32 PM	Actions 🗸

Clone an existing Position Description?

• A new screen will appear with the position description you selected. Once you've verified title accuracy, select the option of, "Clone this Position Description" from the menu on the top right of the screen as pictured below:

Home	Position Descriptions -	Classifications 🗸	Shortcuts
Position Des	criptions / Administrator / Staff / Pay	roll Coordinator	
			Take Action On Position Description 🗸
			🖨 Print Preview (Employee View)
			★ View Supervisor
			Clone this Position Description

The next screen will show the new position description (cloned) which is in a *draft* state.
 Note that you are able to edit each section as needed.

XXXXXXXXXXX





The cloned/copied classification should not require adjustment. Move to the next menu option.

While editing a cloned/copied position description, remember to "Save & Continue" when moving forward throughout the process. Note that the system will time you out after 15 minutes of inactivity.

Save & Continue

Menu option 2- Position Details.



Position Information Field

- Note that the Position Title field is editable.
- The cloned/copied Position Summary field is editable.

Classification Information

	Classification Title	Administrative Assistant									
	FLSA	Non-Exempt									
F	Position Informatic	n									
*	Position Title	Office Assistant									
		В	I	ŝ	8	τī	77	<>	≣	1	
		Enter brief description of position.							-		

Position Summary

Enter brief description of positi

This field is required.

Job Duties

• Edit job duties as appropriate. Note that a position description is not expected to include every single job duty.

 \sim

*Job Duties

This is a required	entry.	Click 'Add Job Duties Entr	y' button to add job duties

* Job Duty Name	Essential Duties
	B I \$ 8 1 ™ ↔ \= \= = = \\ \ ~
* Description of Job Duty	Enter the description of duties.
Remove Entry?	
	Add *Job Duties Entry

Other Fields

• Edit respective information in each of the remaining fields, as appropriate.

Position Information	n Continued
Department	Human Resources
Knowledge Skills and Abilities	B I ← Ø T II ↔ Η H H ⊂ I ← A
 Required Education 	B I S Ø T ™ ↔ E E E E F A
Required Work * Experience	B I ⊕ I II III III III III III III III III IIII IIII IIII IIII IIII IIII IIII IIII IIIII IIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
Preferred Qualifications	$\begin{array}{ c c c c c c c c c c c c c c c c c c c$
Required Certifications, Licenses or Registration:	$\begin{array}{c c c c c c c c c c c c c c c c c c c $
Work Hours	B I ⊕ Π 𝔅 Ξ Ξ Ξ Ε Γ Work Hours.
Physical Demands	B I S I II II III IIII IIII IIII IIII IIII IIII IIII IIIII IIIII IIIIIIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
Level 1 Access	Casiano, Paula (pcasiano) 🗴

Reminder-assign your level 1 user(s) at this time, if applicable.

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Position Descriptions - Filter these results																
Admin/Staff JE	Admin/Staff JD * Previous 1 2 3 4 5 6 7 8 9 Classification Title Position Title Department Supervisor Last Name First Name							42 Statu	43	Ne						
0	Coordinator	Payroll Coordinator	Payroll	Payroll Manager (Christine O'Donnell)										Active		
0	Technician	Accounts Payable Technician	Accounts Payable	Accounts Payable Manager (Melba Huerta)		IS		Jacqueline						Active	è	

• You can search for the supervisor by first/last name, full name, or title. Note that you may need to adjust the position type field to find the respective supervisor. Example: if the supervisor is a faculty member adjust the position type to faculty; if an executive, such as a dean, adjust the position type to executive. If you cannot find the supervisor you are looking for, contact your HR recruiter for assistance.

Search Posit	tion Descriptions	
		Search
Position Type:	Administrator / Staff 💙	
Add Column:	Add Column	~
Department:	Department	
Position Description Status:	×Active	
Outstanding Actions:	Select outstanding actions	~
		Search Cancel

Supervisory Position

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Admin/Staff JD)	Ad hoc Sear	ch	× Ad hoc Search					
	Classification Title	Position Title	Department	Supervisor	Last Name	First Name	Status	Division	
۲	Recruiter- Staff	Recruiting Coordinator	Human Resources	Recruitment Manager (Diane Mazuca)	Casiano	Paula	Active	Legal Affairs and Genera Counsel	il i I

Menu option 4- Optional Position Documents (skip as UIW does not use this option)

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Supervisory Position	
Optional Position Docu	PDF conversion must be completed for the document to be valid when applicable. Document Type
Position Request Summary	Organizational Chart

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