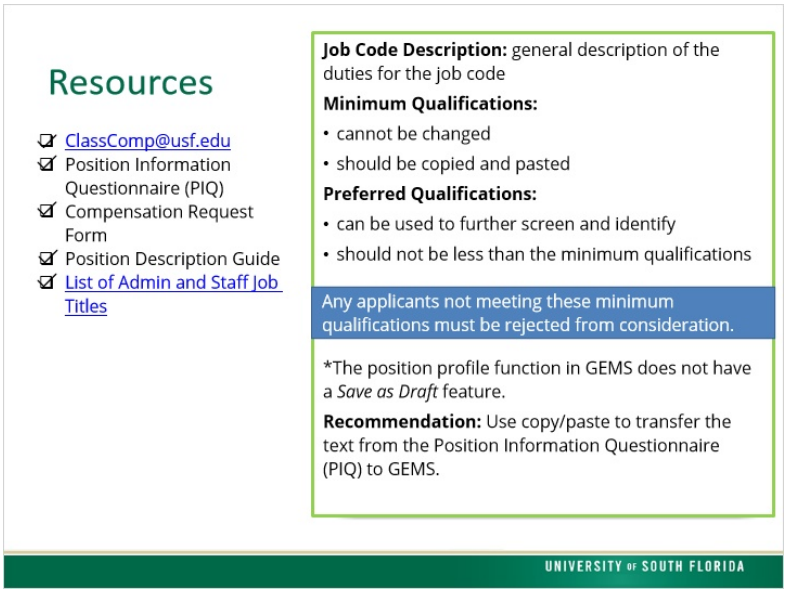
Maintain Positions

This job aid will walk you through the steps to create a new position, update an existing position, or reclassify a position. Once created or updated, approvals are required by the department and by HR.

USF has both Regular and Temporary employees.

- Regular employees can be Faculty, Staff, or Administration (Admin). They will always have a position number.
- Temporary employees do not have a position number and are appointed at intervals of up to one year.
- Faculty, Staff and Admin employees hired on a position have a position profile maintained in GEMS.
- Use “Maintain Job Profile” to review and make changes to a position profile or to create a new position.
- If you’re planning to recruit for an existing Faculty, Staff, or Admin position, you must first review and update the position profile if changes are needed.
- When recruiting for a new position or updating an existing position, department and HR approval is required. You may then create the job opening and proceed with the recruitment.

Resources



Let's review the list of resources to guide you through maintaining positions. First, If you have any questions or are not certain about the job classification for a new position, contact ClassComp@usf.edu for guidance.

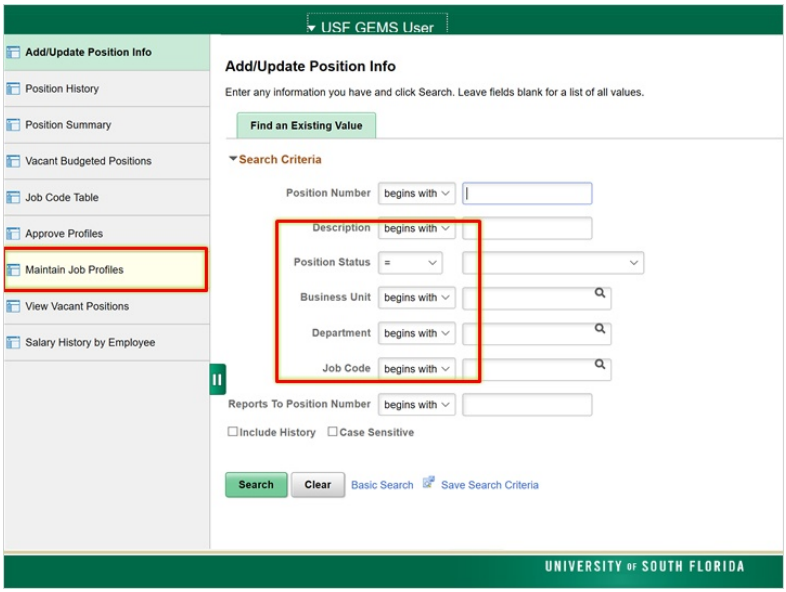
To begin the classification review process, you'll need to complete the **Position Information Questionnaire (PIQ)** and a **Classification and Compensation Request form**. Both of these forms can be found in the HR Forms library.

Every Staff and Admin job at USF has a position description which includes a position summary, essential functions, qualifications, department, and other characteristics. The **Position Description Guide**, found in HR Procedures, is designed to assist you in writing an effective position description. The list of Administrative and Staff job titles, found at https://usfweb.usf.edu/human-resources/resources/admin_staff provides information about every Admin and Staff job code along with a summary description and pay band.
The **job code description** is a general description of the duties for the job code. Please personalize the position description for the needs of the department. The **minimum qualifications** cannot be changed and should be copied and pasted into your position description.
The **preferred qualifications** can be used to further screen and identify the ideal candidate for the position. The preferred qualifications should not be less than the minimum qualifications. When you recruit for this position,

remember that any applicants not meeting these minimum qualifications must be rejected from consideration.

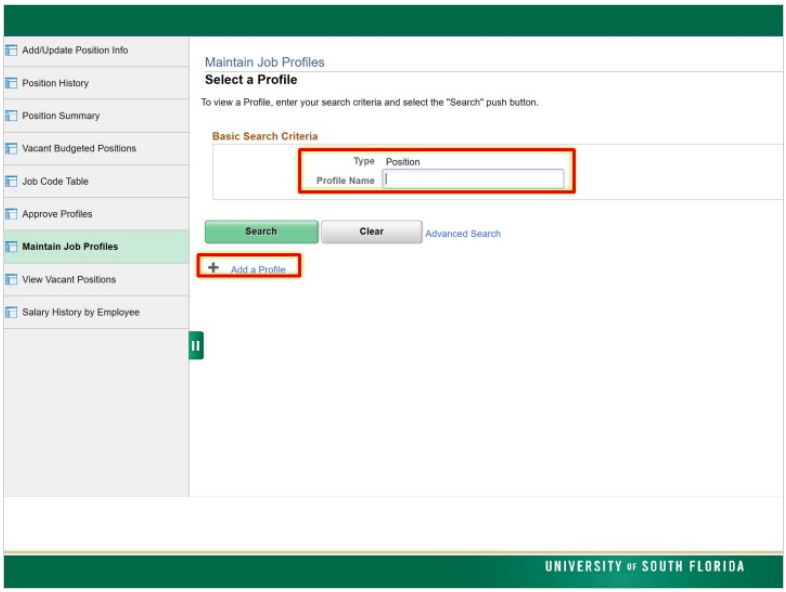
Once the position description is ready, follow the directions in the rest of this training to add it to GEMS. Before starting to create or update a position in GEMS, it's important to know that unlike the job opening, the position profile function in GEMS does not have a Save as Draft feature. As soon as you click "Save," you must either submit for approval or cancel. Because GEMS is not designed to be a text editor, we strongly recommend that you use copy/paste to transfer the text from the **Position Information Questionnaire (PIQ)** to GEMS.

Navigation in GEMS



From the GEMS USER menu, click the "Position/Profile Management" Tile, then click "Maintain Job Profiles."

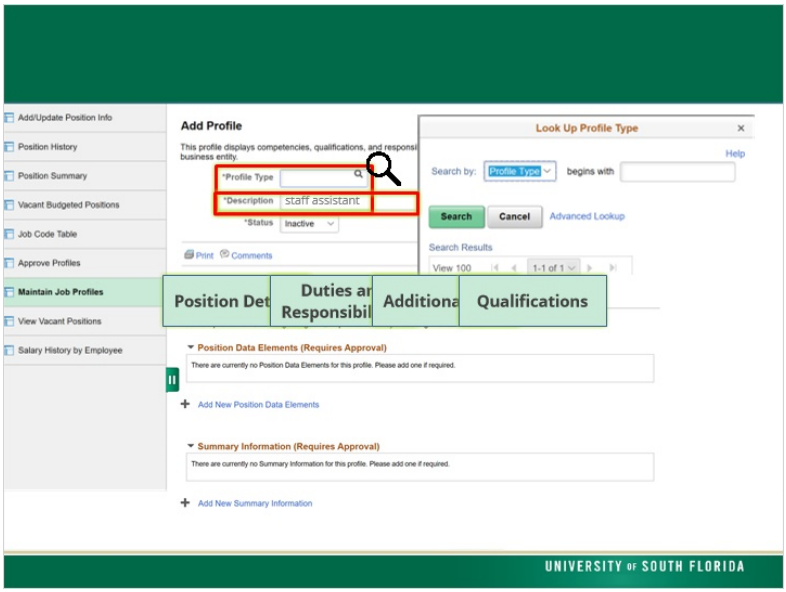
Maintain Job Profile Page



The page opens. If you need to view or update an existing position, type the position number, including the leading zeros, into the “Profile ID” field and click “Search.”

To create a new position, Click “Add a Profile.”

Add Profile Page

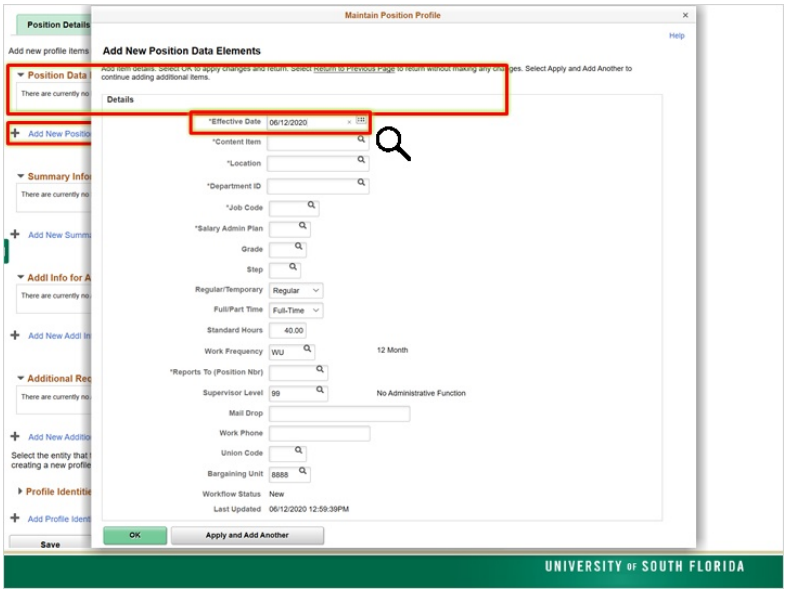


The “Add Profile” page opens and asks for two things - profile type and description. “Role” is the only profile type and it is selected using the magnifying glass lookup.

- The description field is for the job title. Your department might use a working title for a position but the working title has to be at the same level as the job code title.
- The working title may be updated when the classification is finalized by HR. For this example, we’ll add the job title “Staff Assistant.”
- The position profile has four tabs with several sections in each tab.
    - Positions detail tab - This page holds data associated with the job code and with the specific position
    - Duties and responsibilities tab - duties associate with the job, percentage of time for each and wether they are essential
    - Additional Data - This tab allows you to identify the working conditions and requirements for this position. such as Work Environment.
    - Qualifications

In this example, we’ll look at the “Position Details” tab first.

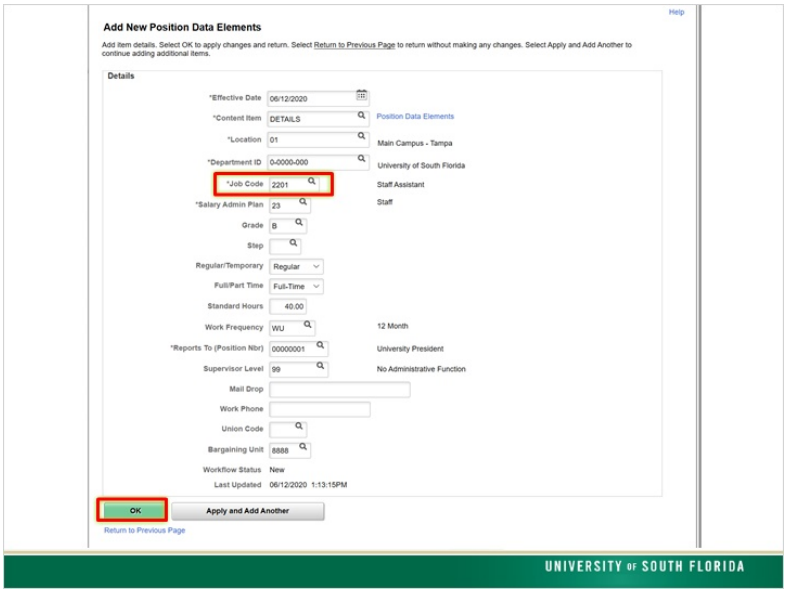
Position Details Tab



We are on the “Position Details” tab. Notice that there is no information in the box under ”Position Data Elements” Click “Add New Position Data Elements.”

Since this is a new position, the effective date will default to the current date but you can change it if the effective date is in the future. Type the information if you know it or use the lookups next to each field.

Data Elements

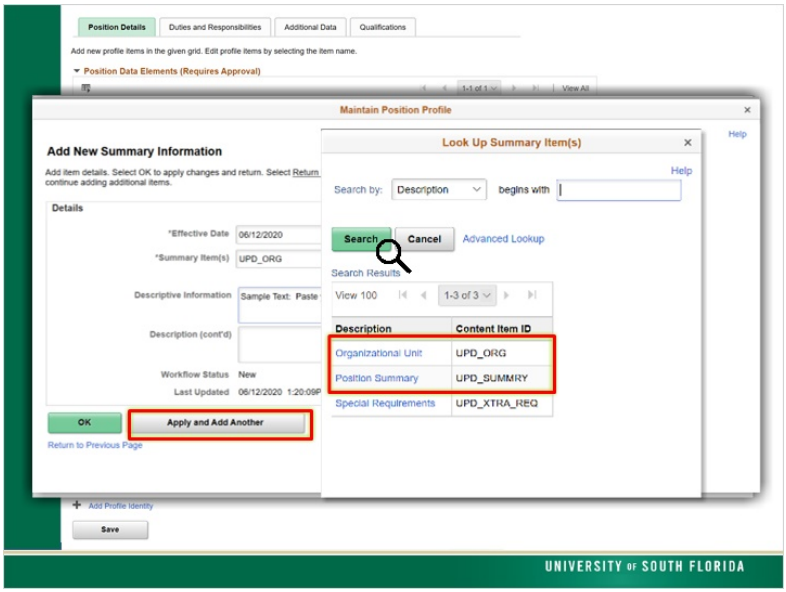


When we added 2201 in the job code field and tabbed out, several other fields auto populated based on default settings.

It is important to populate all the fields, including mail drop and phone number.

Remember that if you have any questions about any of these fields, you can always call HR. When done, click “OK.”

Summary Information



Now there is information in the position data elements box. It shows a link with the information that has just been entered. To make changes, click the pencil icon in the "Edit" column.

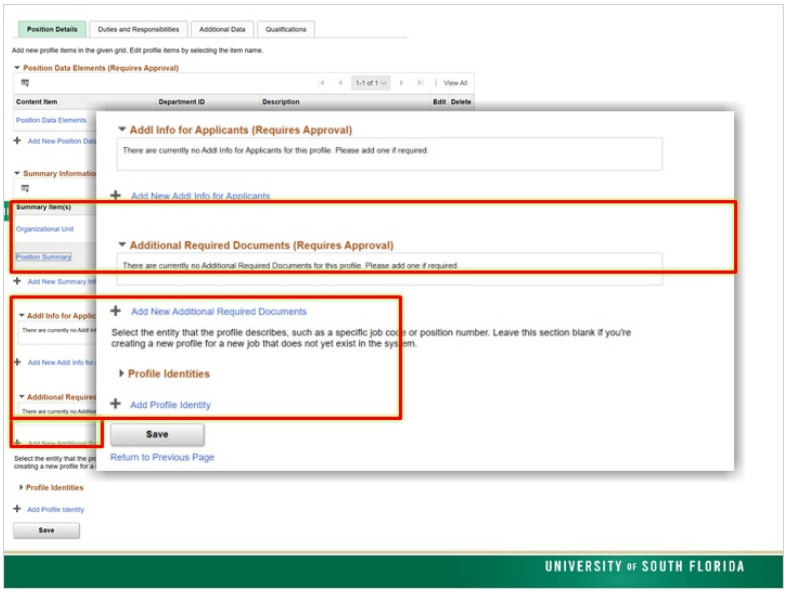
Next, we would add summary information for the department and for the position by clicking "Add New Summary" Information.

On the modal page that opens, select your summary item type. Click the lookup next to the "Summary Item" field.

There are two summary types – "Organizational Unit" and "Position Summary." We'll click "Organizational Unit" first.

Using the Word document with your position description, copy and paste the summary into the field as we have done here. Please remember that the organizational unit summary should be the same for every position in your department or division. Click "Apply and Add Another" so that we can add the position summary.

Position Summary

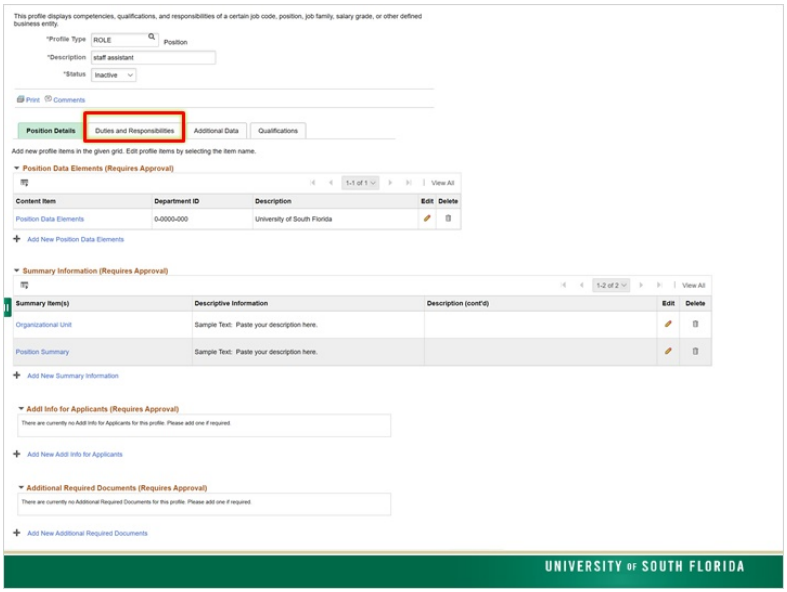


Following the steps we used to add the organizational unit summary, we have added the position summary. The position summary should be a concise overview and usually is only two to three sentences long. When we Click “OK.” We see the two summaries we just created. There are two other sections below.

In the “Add New Additional Information for Applicants” box, you’ll record the hiring range which is located in the job code table for the job classification. Contact ClassComp@usf.edu if you have questions about the hiring range. Click Return to Previous Page.

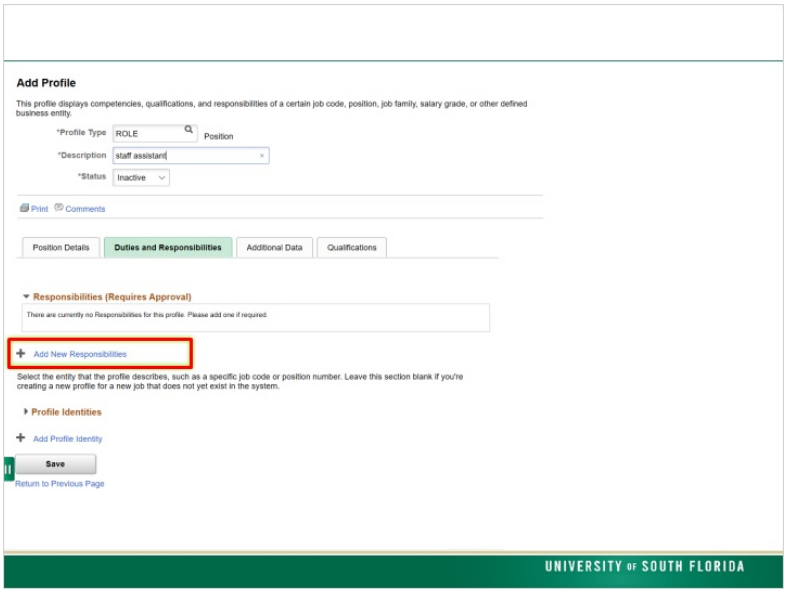
“Add New Additional Required Documents” is typically used for faculty positions to record the types of documents required during a recruitment.

Duties and Responsibilities



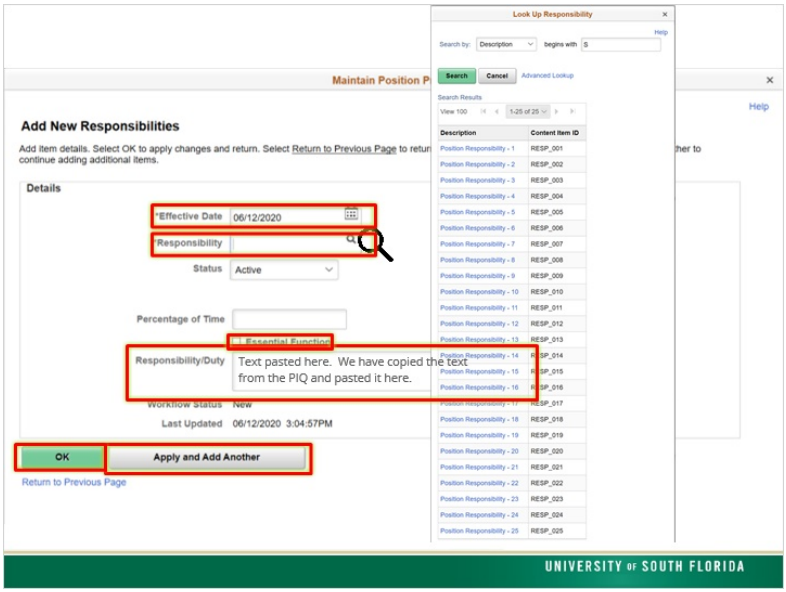
Back at the top of the screen, move to the next tab. Click the “Duties and Responsibilities” tab.

Add New Responsibilities

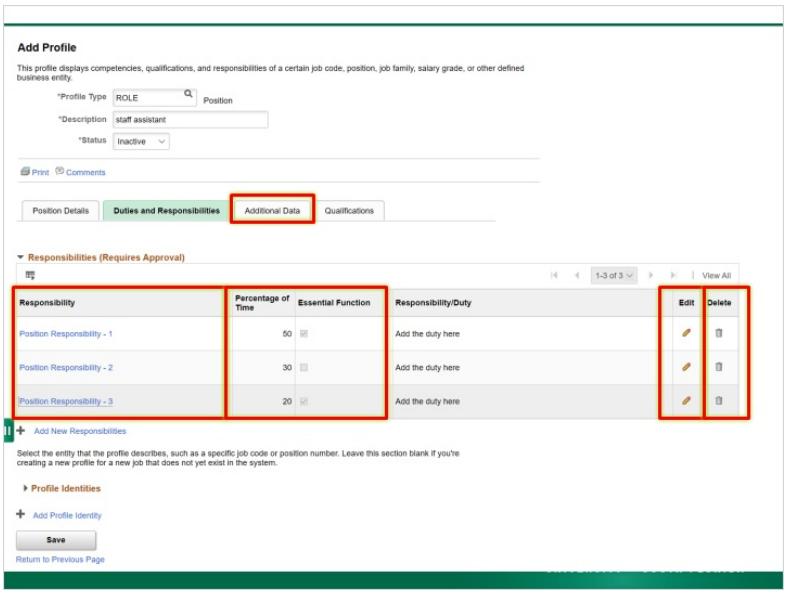


Here, you’ll Add each of the responsibilities for this position. Click “Add New Responsibilities.”

Responsibilities

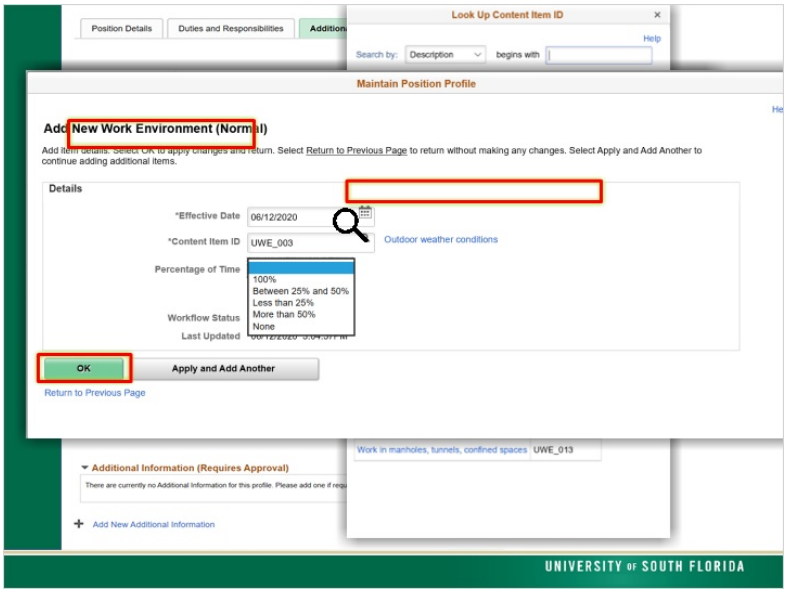


- Remember to change the effective date, if needed. Add the responsibilities by the percentage of time with the highest percentage listed first, using increments of 5%. Click the lookup next to the Responsibility field.
- Give each responsibility a unique number. Responsibilities should be added in order of percentage of time.
- Click “Position Responsibility - 1.”
- Enter the percentage of time and the essential function checkbox has been checked. Click in the “Responsibility/Duty” field to enter the text. We have copied and pasted the text from the PIQ into the responsibility/duty field. Because we have several more duties to add, click “Apply and Add Another.”
- Continue to add each responsibility from the highest percentage of time to the lowest, using copy and paste, until they are all added.
- Be very careful that you add them in order, and check all of the functions that are essential functions. Click “OK” when done.



- Each responsibility is listed in order, along with the percentage of time and a check to designate whether it is an essential function.
- If you notice a mistake at this point, you can click the pencil icon in the "Edit" column or click the trash can icon in the delete column.
- Next, we'll go to the "Additional Data" tab.

Additional Data Tab

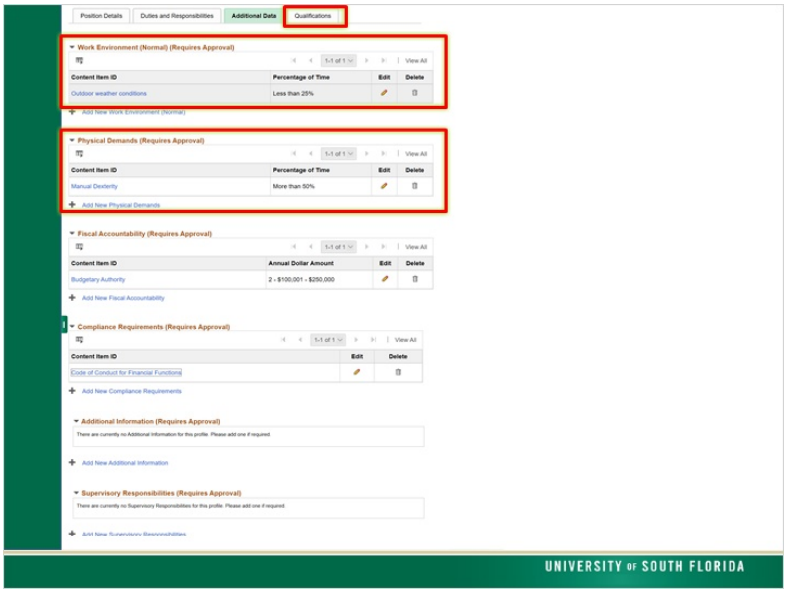


- This tab allows you to identify the working conditions and requirements for this position, physical demand, fiscal accountability,

compliance requirements and more. Click “Add New Work Environment.”

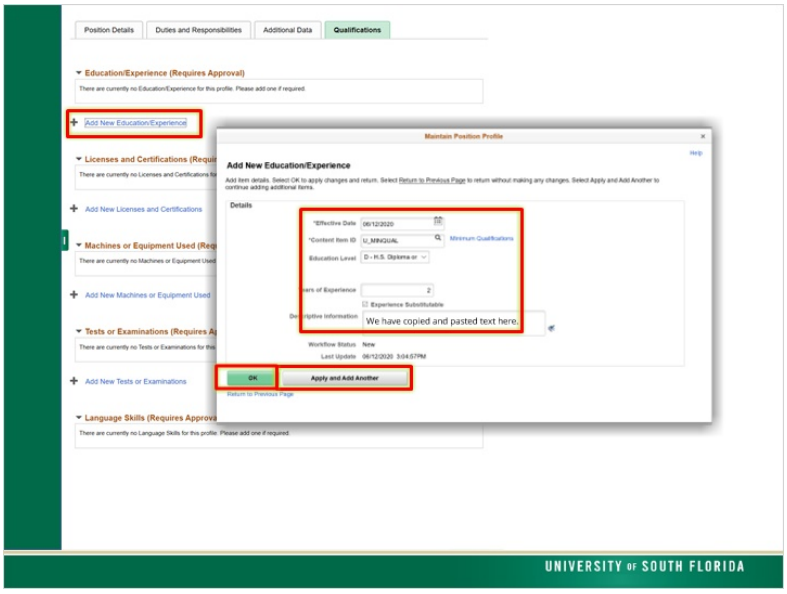
- On the “New Work Environment” page, we clicked the Content Item lookup and see a list of options. Click the first item in the list; office or other indoor work area.
- We have specified the percentage of time using the drop-down box. Click “OK.”

Other Additional Data



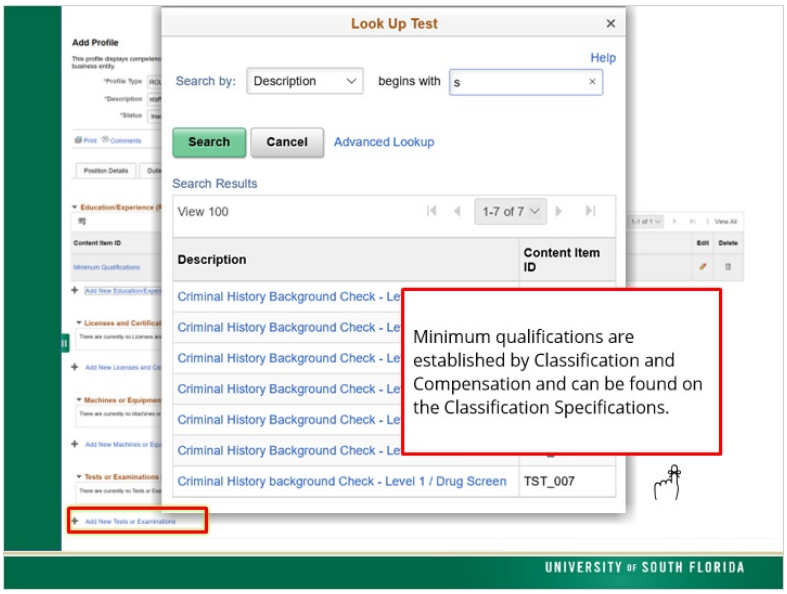
The “Work Environment” displays and can be edited or deleted. Using the same process, we added a physical demand. We would now move down the page, clicking and saving for each option.
We scroll to the top when finished with the page. Click the “Qualifications” tab.

Qualifications Tab



This tab allows you to identify the qualifications expected for someone in this position.

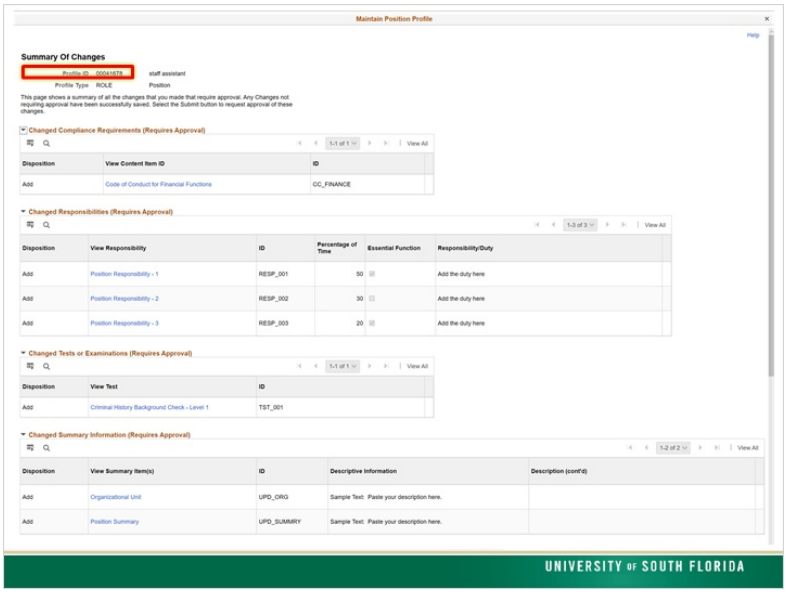
- First add the minimum and preferred qualifications. Click “Add New Education/Experience.”
- We have added the minimum qualifications. Using the “Education Level” drop-down, we selected high school diploma; we added two in the years of experience field.
- We copied and pasted the descriptive information from the Classification Specifications for this job code into the field. We have the option to check the “Experience Substitutable” box, if appropriate.
- Now we are ready to add the preferred qualifications. Click “Apply and Add Another.”
- Once you’ve added the preferred qualifications, Click “OK.”



The qualifications are added but can be edited or deleted at this point. Remember that the minimum qualifications are established by Classification and Compensation and can be found on the Classification Specifications. When we scroll down, we see there are options to add new licenses and certifications that are required for this position. We can add machines or equipment used.

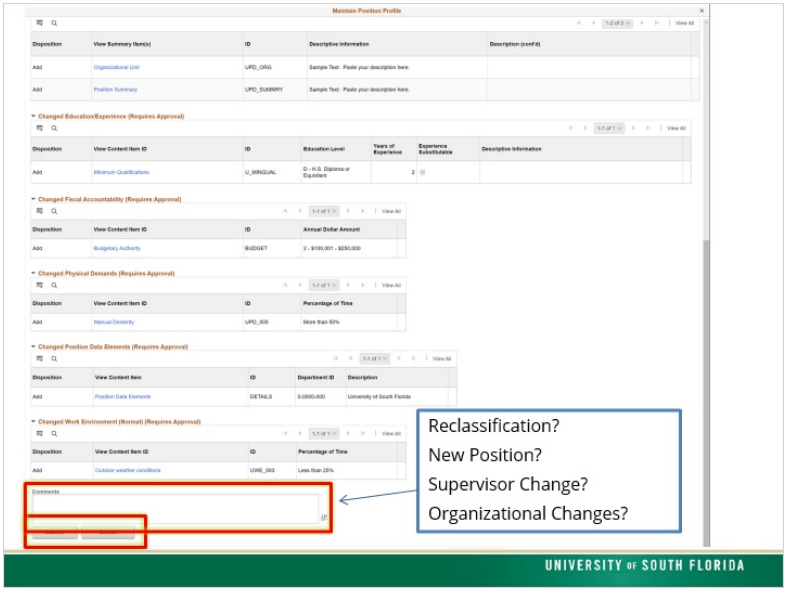
For this position, we don't need to add anything for those two fields but we do need to add the background check. Click "Add new Tests or Examinations." We have clicked the test field lookup and see options for background checks or a drug screen. We choose the appropriate test. Contact HR if unsure which option to choose. Once you have added all information needed, click "Save

Summary of Changes



The summary of changes opens. Notice that you now have a Profile ID at the top; this is the new position number. Be sure to write down this number to make it easier to find later. Read through all the information you added.

Submit for Approval

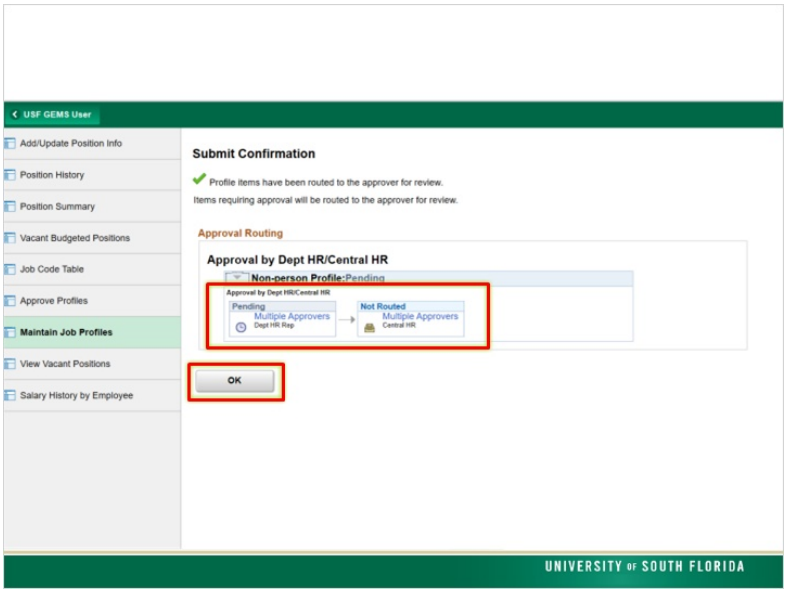


- Look over the summary of changes to be sure everything is correct.
- Use the comments box to tell HR why you are submitting this. Is it a reclassification, a new position, a supervisor change? This is also a

good place to communicate any organizational changes that affect the position or to explain why the duties are changing.

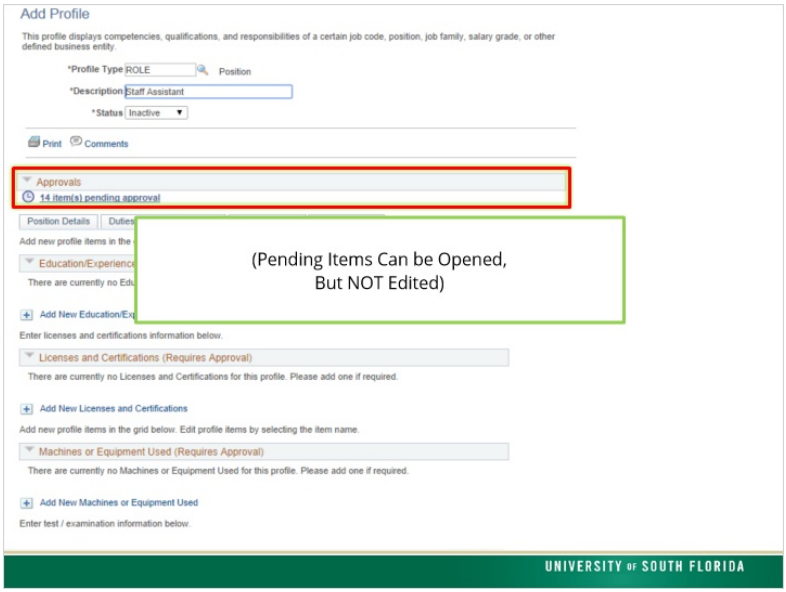
- At this point you can submit the changes or cancel the submission. If you see a problem, click “Cancel.” It doesn’t cancel the changes you’ve made so far; but it does allow you to make changes before submitting. Once submitted , it cannot be edited.

Submit Confirmation



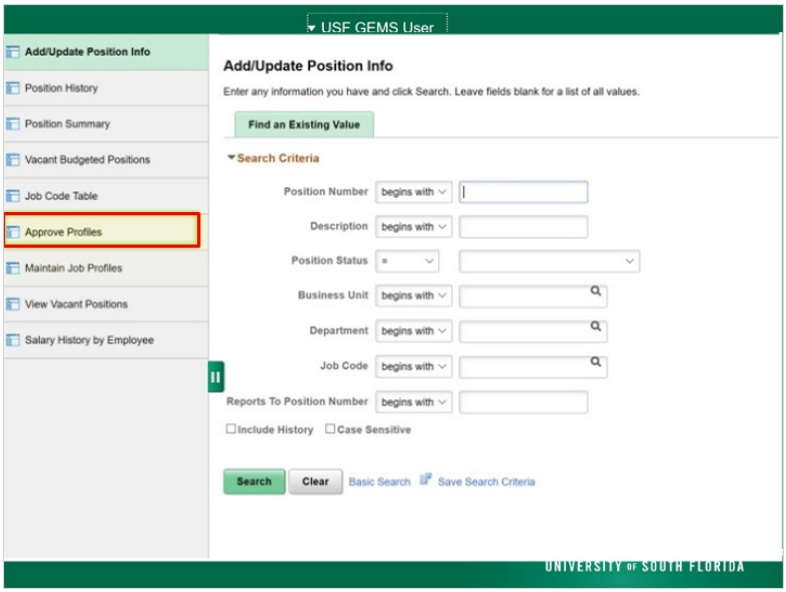
The Submit confirmation page opens with two boxes - the first one shows that this approval is Pending for the Department HR Rep and the second shows it’s not yet routed to Central HR. Click “OK.”

Approval in Workflow



The approval is now in the workflow queue for the Department HR Rep. Back on the Add Profile page, the fields appear empty. That is because the items added are awaiting approval and are available near the top in the approvals section. To view the items submitted for approval, click the link. The Pending Items open, but cannot be edited at this point. If you notice a problem here, you will have to ask the approver to deny the approval.

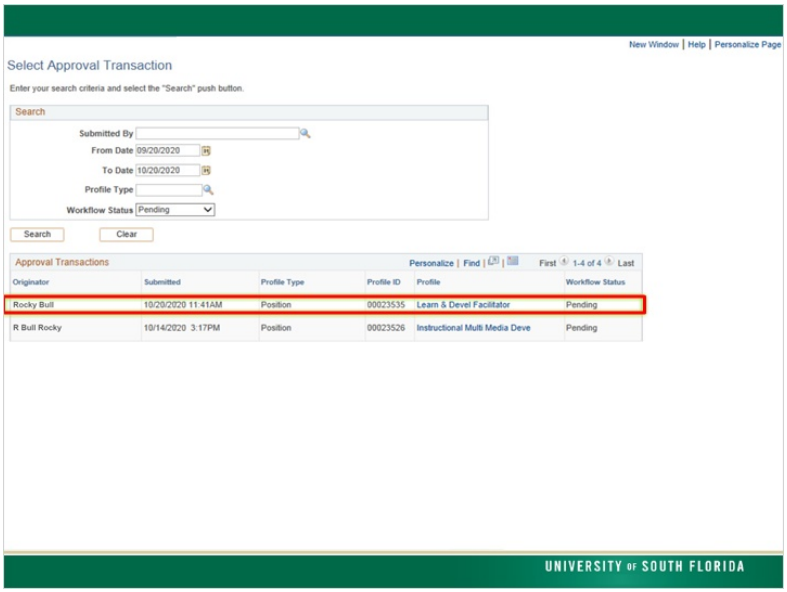
Approve Profiles



There are two levels of approval for position profiles: the department HR rep and central HR. **Following are the steps to approve as a department HR Rep**.

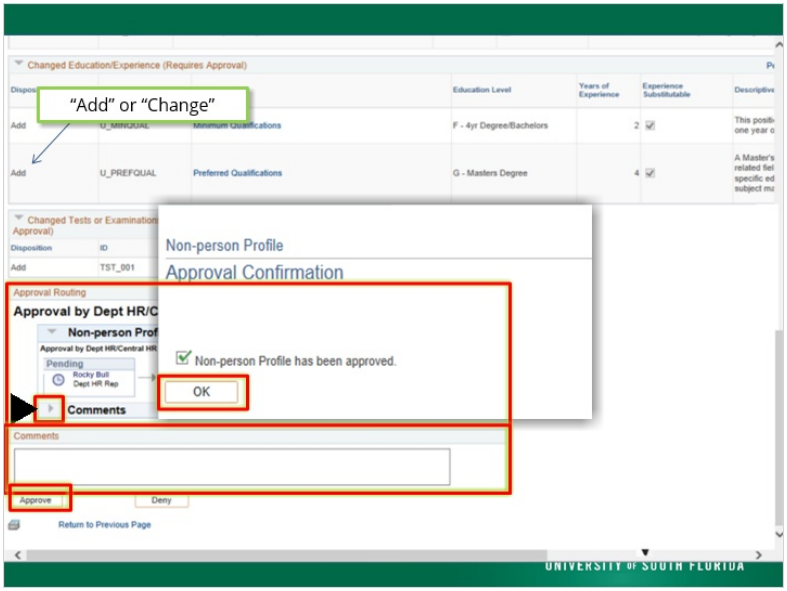
To approve, log in to GEMS Self Service and navigate to Position/Profile Management. This is the same navigation you use to maintain the profiles. Click Approve Profiles.

Choose Transaction



Once logged in as a Department HR Rep, we see the transactions available to approve. In this case, we want to work with the first transaction. We would click the first profile in the list.

Profile Approval

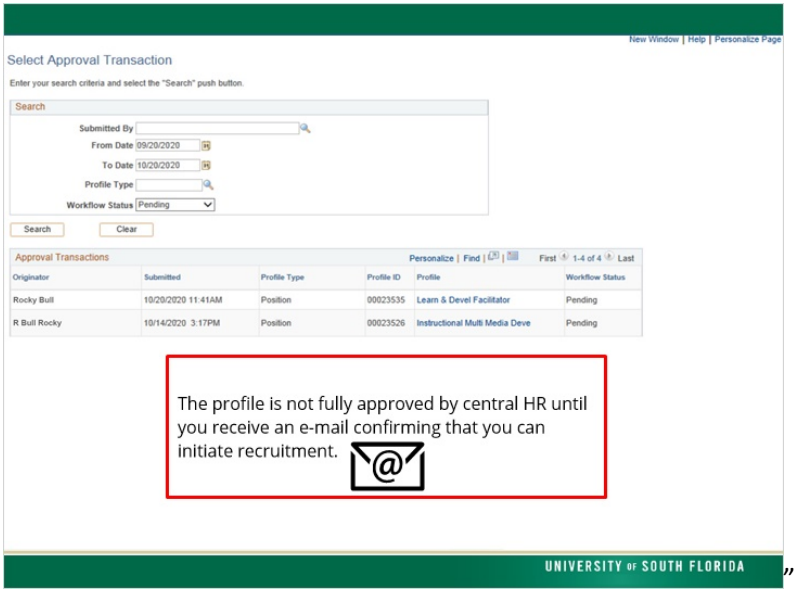


The profile opens and displays all items added or changed. If this approval were for an update to an existing position, it might have only one or two items to review and those items would be labeled as "Change," not "Add," as

we see here.

- At the bottom of the page is the approval routing section. Any comments added previously can be viewed by clicking the small arrow to the left of the word.
- Any additional comments can be added in the comments field. Click "Approve."
- On the Approval Confirmation page, click "OK."

Pending Status



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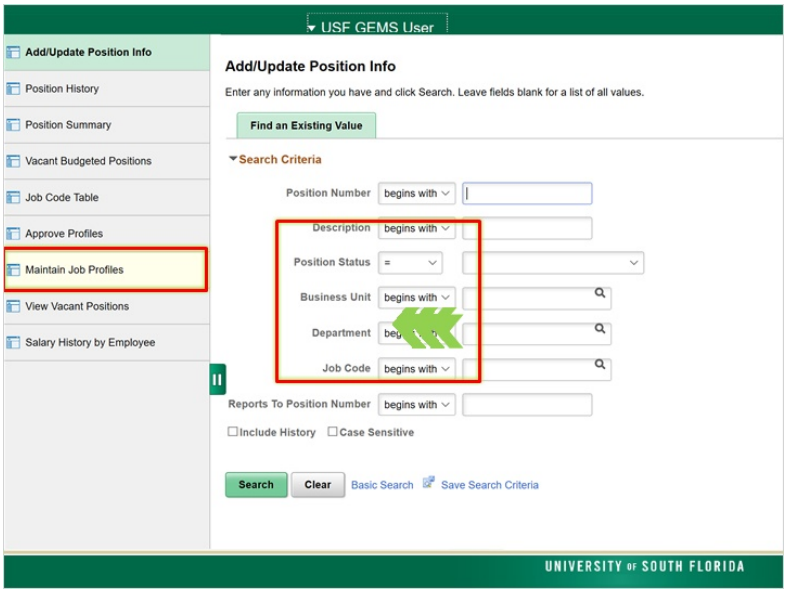
You have approved the first profile in the list. It will remain at a Pending status until it has been approved by central HR. The profile is not fully approved by central HR until you receive an e-mail confirming that you can initiate recruitment.

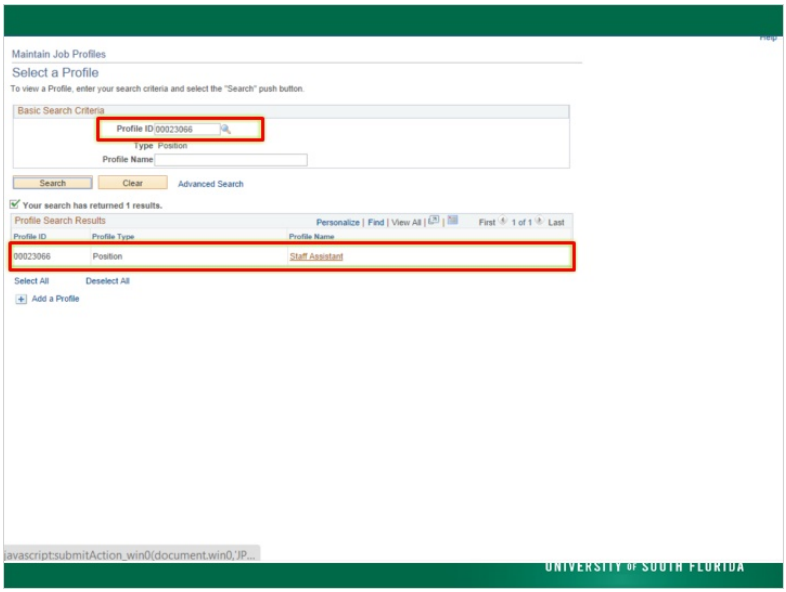
Update Position



Remember that GEMS is not intended to be a text editor and there is no "save as draft" in the position profile. Follow these steps to make updating a profile easier.

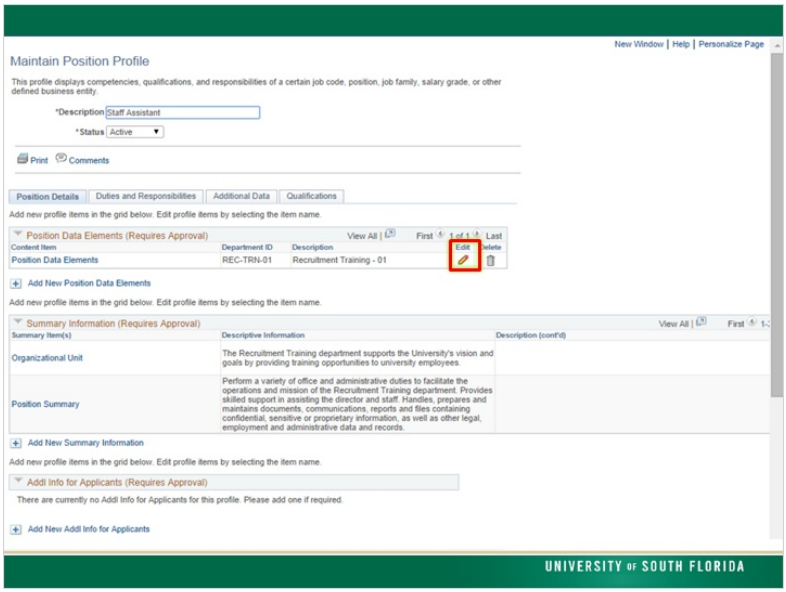
- If the changes are minor, have the supervisor make them in Word.
- For substantial changes have the Manager complete a PIQ.
- Once all changes are finalized, copy and paste from the PIQ or Word into GEMS. Then, submit for approval.
- To update a profile, log into GEMS and navigate to Position/Profile Management. Click Maintain job Profile.

Search by Position Number

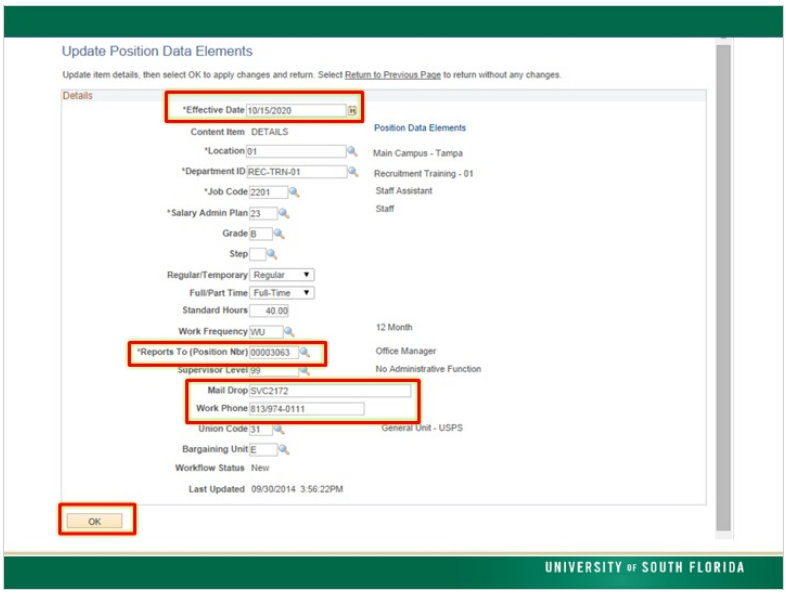


Type the position number as we did here, including the leading zeroes. Click "Search." In the search results, click the profile name link.

Make Changes



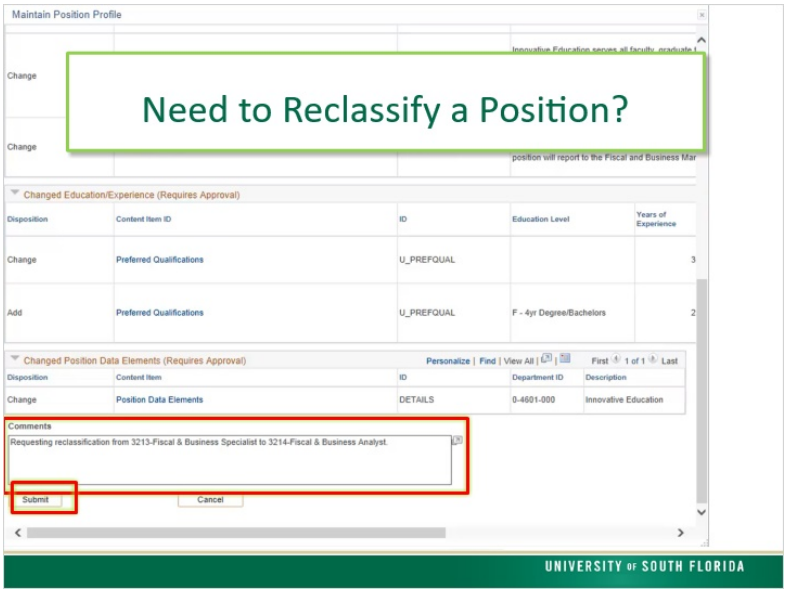
On the maintain position profile page, make all your changes. In this case, we need to make changes to this position's supervisor and mail point. Click the pencil Edit icon.



The very first thing to change is the effective date. If you don't change this date, the change you make will overwrite the existing information and the history is lost.

- Changing the date will, in effect, add a new row. To change the "Reports to," type the position number of the new supervisor into the reports to field.
- Another common change is the mail drop or work phone.
- These fields populate the campus directory, so if they are wrong here in the profile, they will be wrong in the directory.
- Once the changes are made, click OK.

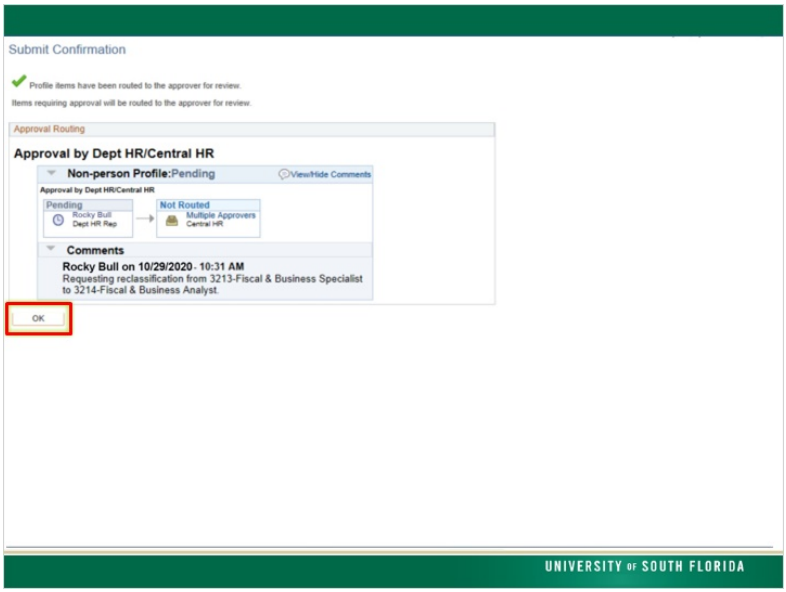
Reclassify Position



What if you need to reclassify a position to better reflect the duties and responsibilities needed by the department?

- A reclassification follows the same steps covered under the Change a position section for most of the process.
- Once you've made all your changes and clicked "Save," the Summary of Changes opens for your review.
- Scroll to the bottom of the page, and use the comment box to let HR know that you are requesting a reclassification from one job code, to another.
- Once this comment is added, click "Submit."

Confirmation Screen



- As with other submissions, the approval goes first to the Department HR Rep, then to Central HR.
- Both approvers can view the comments added by clicking the small arrow next to the word Comments.
- Click OK.