Online Position Description Application

User Manual

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INTRODUCTION

The Online Position Description Application is a tool used by supervisors to create, update, view, and print their subordinates’ position descriptions. It provides a web enabled Position Description form for supervisors to use, stores active and inactive position descriptions in one central repository, and is accessible through Supervisor Self Service.

The Online Position Description Application provides supervisors with easy access to create and update position descriptions and allows them to communicate duties and expectations with their employees. In addition, the human resources community uses this data for vacancy announcements, post-audits, and classification determinations.

THE ONLINE POSITION DESCRIPTION APPLICATION AND FORM

The Online Position Description Application allows for the online completion of the Position Description form. Reviews and acknowledgements of submitted position descriptions are handled electronically and email notifications are sent with each step in the process. When activated, all information, including employee and position data, task descriptions, and essential functions will be online and accessible by the agency.

Throughout the application and this user manual, the following terms are used to indicate the status of a position description: planned, in-process, active, inactive, and canceled.

| Planned position description: A position description that has not been entered into the system by the supervisor or the human resources office. To move from planned to in-process a position number and appropriate email addresses must be identified and the online Position Description form must be completed and submitted in the application. |
| In-process position description: A position description that has been prepared and entered by the supervisor and is currently under the review of the employee and/or the reviewing officer. |
| Active position description: A position description that has been reviewed and/or acknowledged by the supervisor and the employee, and made active by the reviewing officer. The position description remains active until the supervisor modifies it and submits a replacement position description through the review process. The previous position description is made inactive when the reviewing officer activates the new submitted version. |
| Inactive position description: An old position description that was deactivated by the activation of a more recent, updated position description. An active position description will automatically become inactive when a new position description is activated for the same position number. |
| Canceled position description: A submitted position description that was never activated by the reviewing officer, then later canceled by the supervisor. |
There are four essential roles in the development of an online position description:

1. **Supervisors:** Prepare and maintain accurate position descriptions for positions under their direct report.
2. **Employees:** Review and comment on their position descriptions to ensure accuracy and completeness.
3. **Reviewing Officers:** Review and comment on position descriptions in their area and make position descriptions active.
4. **Human Resource Professionals:** Provide consultation on the preparation of position descriptions and may provide a brief technical analysis for positions in their agency.

This document will provide instructions on completing the Position Description form and navigating the application.

**COMPLETING THE POSITION DESCRIPTION FORM**

To create an active, online position description, the STD-370 Position Description form must be completed within the application. A Position Description template developed in Microsoft Word (.doc) has been provided so that supervisors or support staff can first prepare a draft before entering position description information into the online application.

**Use of the Position Description Template and the 3-hour Session Timeout**

Use of the Position Description template is strongly recommended when considerable modifications are being made to the content of a position description or when no previous position description exists for a position. This recommendation is based on a 3-hour session timeout in place within the online application. As soon as the supervisor verifies email addresses for the routing of a position description and accesses the pre-populated online form, he/she has 3-hours to modify and submit the online position description. If supervisors take longer than 3-hours to complete and submit the online form, a session timeout message will appear and all entered information will be lost.

The Position Description template can be found on the lower left side of the main page of the Online Position Description Application ([http://www.occup.state.pa.us/StartPages](http://www.occup.state.pa.us/StartPages)).

Please note that while the Position Description form will pre-populate with data within the Online Position Description Application, the template version is a stand-alone Word document that does not pre-populate.

The Position Description form is comprised of the following elements:

- Header Information
- Position Purpose
- Description of Duties
- Decision Making
- Requirements Profile
- Essential Functions
- Certification
Whether a supervisor is creating a position description or updating an active position description, each of these elements is considered. Guidelines for completing the Position Description form are provided below.

**What is contained in the header information?**
The header information contains data elements pertaining to the employee and/or the position. Employee information includes the employee’s name, personnel number, and work schedule. Position information includes the position number, organizational assignment, supervisor-subordinate relationship, and job title.

**How do I complete the header information?**
Within the Online Position Description Application, the Position Description form is pre-populated with employee and position information, with the following exceptions: Start Time, End Time, Hours/Week, Days Worked and schedule variations. If this information is incorrect, contact your human resources office. Please note that identifying information for vacant positions should not contain employee information.

Supervisors can edit the fields containing the working title, supervisor name, supervisor job title, supervisor position number, and the employee schedule. All other fields in the header section cannot be edited.

Review the identifying information and enter the employee’s start and end times and hours worked per week. Check the boxes under Days Worked for each day the employee is scheduled to work and explain any schedule variations in the field provided.

**What is Position Purpose?**
The Position Purpose statement describes why a position exists and how it contributes to an organization’s objectives.

**How do I complete the Position Purpose?**
The Position Purpose should be no more than one or two sentences in length, but should be comprehensive in stating the purpose of the position. It should be linked to the organization’s mission and should include the overall end result.

The data can be typed directly into the form or copied from the Position Description template or another electronic document. The Position Purpose must be at least 50 characters.

**What is the Description of Duties?**
The Description of Duties represents the major duties and responsibilities assigned to a position. Major duties and responsibilities are those that are important, regular, and recurring. The duties should also be currently assigned, observable, identifiable with the position’s purpose and organization, and expected to continue or recur on a regular basis over a period of time, i.e. the rating cycle.

**How do I complete the Description of Duties?**
Major duties should be listed from most significant to least, or by those duties performed most to least often.

The data can be typed directly into the form or copied from the Position Description template or another electronic document. The Description of Duties section must be at least 50 characters.
**What is the Decision Making Field?**  
The Decision Making field of the position description allows the supervisor to identify the types of decisions made at the position’s level. This field should include the types of decisions made independently at this level, as well as those that must be referred to the supervisor, a coworker, or someone other than the incumbent.

**How do I complete the Decision Making Field?**  
The data can be typed directly into the form or copied from the Position Description template or another electronic document. The Decision Making field must be at least 50 characters.

**What is the Requirements Profile?**  
The Requirements Profile allows the supervisor to identify whether the position requires a licensure, registration, or certification that may be necessary to perform the functions of the position. These position-specific requirements should be consistent with a Necessary Special Requirement or other criteria listed in the job specification.

Supervisors should note that this section of the position description relates to position requirements and not employee qualifications.

**How do I complete the Requirements Profile?**  
The application allows the supervisor to select a license, registration, or certification from a drop down menu. The menu corresponds to current Necessary Special Requirements found in the job specification.

If the position requires a license, registration or certification that is not on the list, contact your human resources office.

**What are Essential Functions?**  
Essential Functions are the tasks of a position that must be performed by the incumbent with or without reasonable accommodation. Functions may be considered essential when:

- The position exists to perform that function;
- There are a limited number of employees available to perform that function; or,
- A degree, expertise or skill is required to perform that function.

For more information on essential functions, please see [Management Directive 205.25, Disability-Related Employment Policy](#) or contact your human resources office.

**How do I complete the Essential Functions?**  
Essential Functions should focus on the purpose of the job, that is, the outcome or results. Essential Functions statements should be written concisely and begin with a verb; for example, "Receives and directs incoming calls." Avoid describing essential functions as abilities; for example, do not write, “Ability to receive and direct incoming calls.”
At least three Essential Functions must be identified within the application. The data can be typed directly into the form or copied from the Position Description template or another electronic document. The Essential Functions fields are limited to 150 characters each.

**What is the Certification Field?**
The Certification field is the supervisor’s acknowledgement that he/she prepared the position description and that the information within it is accurate.

**How do I complete the Certification Field?**
The application pre-populates the Job Title and Date fields. To certify the position description, the supervisor types his/her name into the acknowledgement block. A field is also provided for comments that will be forwarded to the employee via the email notification.

**What is the Comments Field?**
The Comments field allows supervisors, employees and reviewing officers to add comments to be included in the email notification that is sent to the next individual in the acknowledgment process. For example, a supervisor may assign a due date to the employee to review the submitted position description. The message typed into the Comments field is only included in the email notification and not included in the position description.

**How do I complete the Comments Field?**
Type in the message that you would like the receiver to read.
FOR SUPERVISORS

The preparation of a position description begins with the supervisor. The Online Position Description Application gives supervisors the option to prepare a draft of a position description by completing a template or by entering information directly into the application. To begin either process, the supervisor must access the Online Position Description Application website.

Accessing the Site

The supervisor may access the Online Position Description Application at: http://www.occup.state.pa.us/StartPages. The following screen will appear:

The following options are available from the Supervisor Start Page:

- Create a New Position Description
- View Status of Position Descriptions
- Access the Position Description Template
- Download Users' Manual
- Quick Reference Guide for Supervisors

Each if these options is discussed in the following pages.
Create a New Position Description

The first option on the Supervisor Start Page allows supervisors to create new or update active position descriptions. After selecting Create a New Position Description, the Position Number Entry Page will appear, requiring the supervisor to enter his/her eight-digit position number. Please be sure to enter your position number and not your personnel number.

Where can I get my position number?
You can view your position number by going to Employee Self Service and clicking on the My Organization link on the left navigation menu. You may also contact your human resources office to obtain your position number.

After entering the position number, a screen similar to the one shown below will appear. The list includes all positions, filled and vacant, reporting to the position number entered on the Position Number Entry Page.
To proceed with preparing the position description, click the Select link.

If employees are listed who do not report to you, or if not all of your subordinates are listed, contact your human resources office. In addition, if the position status for a position is inaccurate, i.e. a position is listed as being “F” for “Filled” when it should be “V” for “Vacant”, and vice versa, contact your human resources office since this error requires an update to the Vacancy Infotype (IT 1007) in SAP.
Creating New Position Descriptions for Employees with Email

If no position description exists for the position number entered, and the position is filled, the following screen will appear:

The supervisor should verify that the pre-populated email addresses listed for his/her position, the employee, and reviewing officer are correct and then select the appropriate email address for the human resource office from the drop down menu. If the employee does not have an email address, please see Creating New Position Description for Employees without Email.

Why am I verifying email addresses?
The application automatically sends email messages to the employee, the reviewing officer, and the human resources office at various stages of the review process. The email messages notify each individual in the process of the status of the position description and provide instructions on proceeding with the process. If the email addresses listed are not correct, the position description will not be routed to the inappropriate individuals.

After verifying that the email addresses are correct and clicking the Next button at the bottom of the screen, the Online Position Description form will appear with pre-populated employee and position information. The supervisor should review the identifying information and complete the form by entering data directly or by copying and pasting data from the Position Description Template previously completed in Microsoft Word. For instructions on completing the Position Description form, please see COMPLETING THE POSITION DESCRIPTION FORM.
After the required information has been entered, the supervisor may select *Submit* at the bottom of the page. The date and time of the position description’s submission will be recorded. Congratulations, your “planned” position description is now considered to be “in-process.” A confirmation page will appear:

![Confirmation Page](image)

When the position description is submitted, an email will be sent to the employee, informing him/her that the supervisor has completed his/her position description. Also within the email notice is a link to the Employee Logon Page that the subordinate can use to review the in-process electronic position description and the access code necessary to use the site.

**What is an access code?**
The access code is a random, system-generated number that allows each individual in the review process to access an in-process position description. Access codes are also needed to print active, inactive, or canceled position descriptions. Access codes should be kept confidential.
Creating New Position Descriptions for Employees without Email

If a position description is needed for a filled position, and the employee does not have access to an email account, the supervisor should select the *If your employee does not have access to email, click here*. After selecting this option, the following screen will appear:

The supervisor should verify that the pre-populated email addresses listed for his/her position and reviewing officer are correct and then select the appropriate email address for the human resource office from the drop down menu. When the supervisor selects *Next*, the Online Position Description form will appear with pre-populated employee and position information.

The supervisor should review the identifying information and complete the form by entering data directly or by copying and pasting data from the Position Description Template previously completed in Microsoft Word. For instructions on completing the Position Description form, please see *COMPLETING THE POSITION DESCRIPTION FORM*.

The supervisor should print and have the employee sign the position description. If the supervisor would like to include a message to the reviewing officer via the email notification, he/she may type a message in the Comments field in the Certification section. Once the supervisor selects *Submit*, an access code is generated and an email message is sent to the reviewing officer, notifying him/her that a position description has been submitted.
Creating Position Descriptions for Vacant Positions

The process to complete a position description for a vacant position is similar to the one followed to complete a position description for an employee without email. Once the supervisor enters his/her position number into the Position Number Entry Page, those positions that directly report to that supervisor will appear. Vacant positions are identified by a “V” in the Filled/Vacant column, as shown below:

![Image of Employees under your supervision](Image)
To create a position description for a vacant position, click the Select link. The following screen will appear:

![Create a New Position Description for a Vacant Position](image)

Our records indicate that this position is currently vacant.

The supervisor should verify that the pre-populated email addresses listed for his/her position, the employee, and reviewing officer are correct and then select the appropriate email address for the human resource office from the drop down menu. When the supervisor selects Next, the Online Position Description form will appear with pre-populated employee and position information.

The supervisor should review the identifying information and complete the form by entering data directly or by copying and pasting data from the Position Description Template previously completed in Microsoft Word.

For instructions on completing the Position Description form, please see COMPLETING THE POSITION DESCRIPTION FORM.

If the supervisor would like to include a message to the reviewing officer via the email notification, he/she may type a message in the Comments field in the Certification section. Once the supervisor selects Submit, an access code is generated and an email message is sent to the reviewing officer, notifying him/her that a position description has been submitted.
Updating an Active Position Description for Filled Position

After the employee has acknowledged the in-process position description, it can be approved and activated by the reviewing officer. If the employee leaves or changes occur to the employee’s position, the supervisor may update the active position description.

To update the active position description, the supervisor accesses the Create a New Position Description link from the Supervisor Start Page (http://www.occup.state.pa.us/StartPages) and enters his/her position number into the Position Number Entry Page and selects a position number. After clicking the Select link, the following screen should appear (If the following screen does not appear and a message indicates that “A position description (PD) is already in-process for this position…” refer to the instructions for Canceling In-process Position Descriptions):

The supervisor should verify that the pre-populated email addresses listed for his/her position, the employee, and reviewing officer are correct and then select the appropriate email address for the human resource office from the drop down menu.

When the supervisor selects Next, the Online Position Description form will appear with pre-populated employee and position information. The supervisor should review the identifying information and make any necessary modifications based on discussions with the employee, reviewing officer, and/or human resources office.

For instructions on completing the Position Description form, please see COMPLETING THE POSITION DESCRIPTION FORM.
After submission, the review process will include the employee and the reviewing officer. Once the updated position description is activated by the reviewing officer, the previously active position description will be changed to an “Inactive” status.

**Canceling In-process Position Descriptions**

If you are trying to create or update a position description and you receive the message that “A position description (PD) is already in-process for this position”, you have the option of retaining and resubmitting the in-process position description to your subordinate, or canceling it.

To determine whether to retain and resubmit an in-process position description or cancel it, first view the in-process position description by selecting the “View PD In-Process” link. This link provides a read-only view of the in-process position description. From this view determine whether or not the employee, job, or organization of the position has changed since the time the in-process position description was created. If any of these characteristics associated with the position has changed, you must first cancel the position description in-process in order to be able to create a new one.

To cancel the in-process position description, select the “Cancel PD In-Process” link. (Note: Canceled PDs are not deleted and are still viewable from the “View Status of Position Descriptions” area in the event that content within the canceled position description may still be useful when drafting or creating the updated position description.)
To retain the position description and resubmit it to your subordinate, copy the access code from the top of screen and enter it in the Supervisor Re-entry Page (link provided). By doing so, you will be given the opportunity to verify the email addresses for routing of the position description as well as the ability to edit the content body. (Note: Employee, job, and organization information will not be updated or editable in the header when opting to retain and resubmit a PD In-Process. For this reason, if any changes to these characteristics are required, the position description must be canceled.)

Once a position description in-process has been canceled, return to the instructions for Updating an Active Position Description for Filled Position.

**View Status of Position Descriptions**

The second option on the Supervisor Start Page will allow supervisors to view all active and in-process position descriptions for positions under their supervision. After selecting View Status of Position Descriptions, the Position Number Entry Page will appear, requiring the supervisor to enter his/her eight-digit position number. Please be sure to enter your position number and not your personnel number.

After the supervisor inputs his/her position number into the field provided, a status page similar to the one below will appear. From the status page, supervisors can review the status of all submitted position descriptions, modify or resubmit an in-process position description, create or update an active position description, or print an active position description.
If no position descriptions have been submitted, a message will appear stating, “Either you have not submitted any online position descriptions or this is not a supervisory position.”

The status page provides supervisors with access codes, and employee names and position numbers for submitted position descriptions. The status page also records the date and time that each individual in the review process acknowledged the submitted position description and when the position description was made active.

The status page contains all active and in-process position descriptions created or updated under this supervisory position. If the active position description for one of your subordinates was created under a different supervisory position number, the position description will not appear on this page. To view inactive and canceled position descriptions, the supervisor can click on the View Inactive/Canceled link at the top right of the page.
Modifying or Resubmitting Position Descriptions

If a supervisor needs to modify a submitted position description based on discussions with the employee, reviewing officer, or human resources office, he/she may go the status page and select “To modify a position description already in-process or to resubmit a position description already in-process to your subordinate, copy the appropriate Access Code from above and paste it into the Supervisor Re-entry Page”. The Supervisor Re-entry Page will appear:

![Supervisor Re-entry Page](image)

After inputting the access code, the submitted position description will appear. From this point, the supervisor may make any necessary modifications and resubmit the position description through the review process. For instructions on completing the Position Description form, please see [COMPLETING THE POSITION DESCRIPTION FORM](#).

When the position description is resubmitted, the employee receives an email notification to review the position description. If at any time an employee accidentally deletes or does not receive the email notification for a position description submitted by the supervisor, the supervisor may resend the email notification by selecting “To modify a position description already in-process or to resubmit a position description already in-process to your subordinate, copy the appropriate Access Code from above and paste it into the Supervisor Re-entry Page” link, entering the access code, and selecting Submit.
Printing Active Position Descriptions

To print an active position description, the supervisor can click on the link found in the status page, "To print an active position description, copy the appropriate Access Code from above and [click here]" or log on to [http://www.occup.state.pa.us/Print](http://www.occup.state.pa.us/Print). The following screen will appear:

The supervisor will need to copy and paste or enter the access code for the active position description into the appropriate field. To print the position description, the supervisor should follow the print instructions on this page.

Access the Position Description Template

The third option on the Supervisor Start Page is to access the Position Description template. In many situations a supervisor may not be comfortable entering information directly into the application without reviewing a draft. By accessing the Position Description template, the supervisor or support staff can complete the Position Description form in MS Word format and make modifications to the information prior to entering it into the application. A supervisor can also complete the offline template and send it to a designee for input into the Online Position Description Application. For instructions on completing the Position Description form, please see [COMPLETING THE POSITION DESCRIPTION FORM](#).

Individuals should be aware, however, that the completion of the template is for review purposes only. Position descriptions can only be made active by accessing the online application, entering information into the application’s Position Description form, and following the review and activation process.
Download the Users’ Manual

This option allows access to an electronic version of this manual. Users can print or save the manual to another location.

Quick Reference Guide for Supervisors

Use these links to download a handy quick-reference guide in either PDF or Microsoft Word document format.
FOR EMPLOYEES

After receiving the email notification that the supervisor has completed a position description, the employee may click on the link provided in the email or log onto the Employee Logon page of the Online Position Description Application website at http://www.occup.state.pa.us/Subordinate. The following screen will appear:

To log on, the employee must enter the access code that was generated when the position description was submitted by the supervisor. This access code will be in the email notification. After entering the information, the in-process position description form will appear.

The employee is responsible for reviewing the submitted position description to ensure that the information is accurate. After reviewing the position description, the employee may certify the position description by entering his/her name in the Employee Acknowledgement field. The employee also has the option to provide comments in the Comments field. The comments will be forwarded to either the supervisor or the reviewing officer via the email notification, depending on who is next in the review process.
Before submitting the position description, the employee must choose an option from the drop-down menu. Those options are:

- I acknowledge this position description.
- I would like to discuss this position description prior to sending it to the reviewing officer.
- I have discussed this position description with my supervisor, but I refuse to acknowledge it.

With options #1 and #3, an email notification is sent to the reviewing officer informing him/her that the employee has acknowledged or refuses to acknowledge the position description. With option #2, an email is sent to the supervisor, notifying him/her that the employee wishes to discuss the content of the position description.

Only the supervisor can edit a position description. If the employee and the supervisor agree to alter the content of the position description, the supervisor must access the Online Position Description Application, update the information, and re-submit it to the employee.
FOR REVIEWING OFFICERS

After receiving the email notification that the employee has submitted a position description, the reviewing officer may click on the link provided in the email or log onto the Reviewing Officer Logon page of the Online Position Description Application at http://www.occup.state.pa.us/Reviewing_Officer. The following screen will appear:

![Reviewing Officer Logon Page](image)

To log on, the reviewing officer must enter the access code that was generated when the position description was submitted by the supervisor. This access code will be in the email notification. After entering the information, the submitted position description form will appear.

In addition to the supervisor and the employee, the reviewing officer is responsible for reviewing the submitted position description to ensure that the information is accurate. After reviewing the position description, the reviewing officer may certify the position description by entering his/her name in the Reviewing Officer Acknowledgement field. A Comments field is also provided. The comments will be forwarded to either the supervisor or the human resources office via the email notification, depending on who is next in the review process.
The Certification section of the position description appears below.

Before submitting the position description, the reviewing officer must choose an option from the drop-down menu. Those options are:

- Activate this position description.
- Send this position description back to the supervisor for modifications.

With option #1, the position description is made active when the reviewing officer selects Submit. Upon activation, the supervisor, employee, and human resources office are notified via an email that the position description has been made active. With option #2, an email is sent to the supervisor, notifying him/her that the reviewing officer believes a change needs to be made to the position description.

Only the supervisor can edit a position description. If the employee and the supervisor agree to alter the content of the position description based on a recommendation from the reviewing officer, the supervisor must log onto the website, update the information, and re-submit it to the employee.
FOR THE HUMAN RESOURCES OFFICE

After receiving the email notification that the reviewing officer has activated a position description, the human resources professional may click on the link provided in the email or log onto the HR Office Logon page of the Online Position Description Application website at [http://www.occup.state.pa.us/HR_Office](http://www.occup.state.pa.us/HR_Office). The following screen will appear:

To log on, the human resources professional must enter the access code that was generated when the position description was submitted by the supervisor. This access code will be in the email notification. After entering the information, the active position description form will appear.

The human resources office is responsible for providing consultation on the preparation of position descriptions and for ensuring that the duties and responsibilities are consistent with the employee’s classification. A field is provided for the human resources professional to provide a brief technical analysis for the position.
Before selecting *Submit*, the human resource professional must choose an option from the drop-down list. Those options are:

- No modifications to this position description are necessary.
- Request that modifications be made to the position description.

With option #1, no further action is required. With option #2, an email is sent to the supervisor, notifying him/her that modifications need to be made to the position.
MAINTAINING POSITION DESCRIPTIONS

Once the reviewing officer activates a submitted position description, email notifications are sent to both the supervisor and the employee. Within the email is the link to the site from which the active position description can be printed. For employees without email, a signed a paper copy of the position description should be kept on file.

Position descriptions should be reviewed on an annual basis and updated accordingly. To access the active position description, the supervisor must access the Online Position Description Application website at http://ww.occup.state.pa.us/StartPages and follow the submission and review processes.

CLOSING

If you have any questions or concerns regarding the Online Position Description Application, please contact your human resources office.