UC SANTA BARBARA | Job Builder

Rev July 2024

Job Builder User Guide - Submitter/Preparer

Table of contents is dynamic - click on a topic and it will take you directly there.

Log In / Log Out

1. To log in to Job Builder URL: https://universityofcalifornia.marketpayjobs.com

1. Log In to Job Builder:

UNIVERSITY OF CALIFORNIA

Click here to log in using SSO (single sign on)

Welcome to Job Builder

Click Here for Single Sign-On (SSO)

This login page is for current UC employees only.

Admin User Only

Password

This section is for system admins only

Admin Sign In

2. Log Out of Job Builder:

Click here to Log Out

SBCMP - UC Santa Barbara

Home Page Navigation

Job Description System

Home Page

Welcome

Kathy Moore

Search ∧
- Job Library
- Job Catalog

My Information ∧
- Jobs that Report to Me
- My Employees
- View My Job

Actions ∧
- Add New Job Description
- Revise Job Description
- My Job Tasks

Analytics ∧
- CT Job Standards Matrix
- CT Job Standards

Search ∧
- JD Acknowledgements

❷ **Tasks**

| | Q | Clear |

Please Review: TEST Job 2 for training — Job Description Review

Please Review: TEST Job 3 for training — Job Description Review

View any jobs that you have in Workflow by double-clicking on the row.

Blue navigation bar menu items contain the same information as the Quick Links.

4

Quick Links

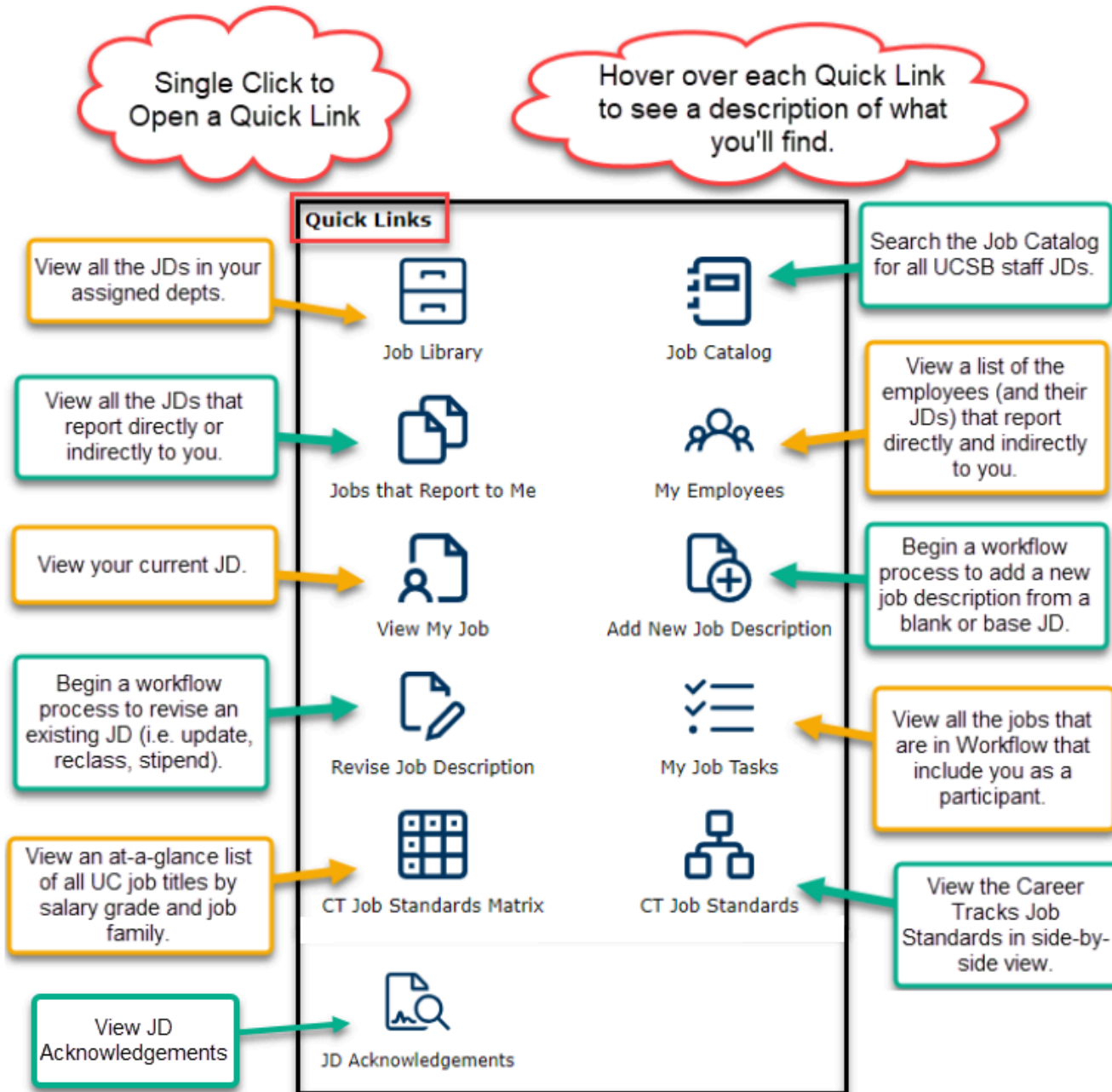1. Quick Links are the quickest way to navigate to the place you want to go.

Single Click to Open a Quick Link

Hover over each Quick Link to see a description of what you'll find.

Quick Links

View all the JDs in your assigned depts. → **Job Library**

Search the Job Catalog for all UCSB staff JDs. → **Job Catalog**

View all the JDs that report directly or indirectly to you. → **Jobs that Report to Me**

View a list of the employees (and their JDs) that report directly and indirectly to you. → **My Employees**

View your current JD. → **View My Job**

Begin a workflow process to add a new job description from a blank or base JD. → **Add New Job Description**

Begin a workflow process to revise an existing JD (i.e. update, reclass, stipend). → **Revise Job Description**

View all the jobs that are in Workflow that include you as a participant. → **My Job Tasks**

View an at-a-glance list of all UC job titles by salary grade and job family. → **CT Job Standards Matrix**

View the Career Tracks Job Standards in side-by-side view. → **CT Job Standards**

View JD Acknowledgements → **JD Acknowledgements**

View My Job

1. View a print version of your job description in PDF or HTML.

Your payroll title and Position ID.

Click on PDF Format to see a print version.

Print JD.

Scroll down to see full JD.

Job Description:
Administrative Manager 1 (40035501)

Print Profile:
Default

Preview Job Description
- ● PDF Format
- ○ HTML Format

Download/Share Job Description

Download (or share) a Word, PDF or HTML version of your JD.

1 of 9 — | + Automatic Zoom

UC SANTA BARBARA

ADMIN MGR 1 (000547)
Job Description

View tool tips for additional information on filling out the Job Details section. A downloadable Job Description template is available on the HR website at https://www.hr.ucsb.edu/hr-units/compensation/oacis

Job History/Status

Approved Date:	9/15/2023 5:21:40 PM
Date Last Edited:	9/15/2023 5:21:37 PM
Last Action Approved:	HR Admin Update
Last Action Effective Date:	9/11/2023

Organization Details

Business Unit (Location):	SBCMP
Department Code	PERS
Department Name:	PERS (HUMAN RESOURCES)
Division Name:	Admin Services
Department Profile (Specific Information about Department/Program):	The Department of Human Resources is dedicated to providing exemplary customer service in support of teaching, research and the public service mission of UCSB. We are committed to forming strategic partnerships within the UCSB community that create a work environment designed to attract, develop and retain the best qualified people. The department has a staff of 30+ employees and is made up of the following units: Compensation and Classification, Employee Engagement, Employee and Labor Relations, Employee Services (academic and staff assistance program, leave administration, healthcare facilitation, work/life resources, workplace accommodations), Talent Acquisition/Training and Development, UCPath Position Control/Workforce Administration, and HR office operations.

Jobs that Report to Me

1. All job descriptions for positions that report directly or indirectly to you will appear in a searchable grid, including your own job description.

Narrow your search using the open text search.

Narrow your search using the smart search drop-down filters.

View and org chart of all the jobs that report to you.

Export an Excel version of the grid.

Home Page | **Jobs that Report to Me**

Single click on any row then click here to view all details about this JD in Form View.

Search

☐ | × | All My Jobs | ⌄ | 🔍

🎛 Org Chart | 🖹 Export | •••

Scroll down to see more rows.

Side-By-Side

Action	Action Requested	Department Name	Position ID	System Title	UC Job Code	UC Payroll Title	Working Title	Cl
📄 👥 ♡	HR Admin Update	PERS (HUMAN RESOURCES)	40034410	Benefits Analyst 3 (40034410)	007720	BENEFITS ANL 3 (007720)	Health Care Facilitator	
📄 👥 ♥	HR Admin Update	PERS (HUMAN RESOURCES)	40035047	Benefits Analyst 3 (40035047)	007720	BENEFITS ANL 3 (007720)	Work-Life Resource Coordinator	
📄 👥 ♡	HR Admin Update	PERS (HUMAN RESOURCES)	40077113	Benefits Analyst 3 (40077113)	007720	BENEFITS ANL 3 (007720)	Workplace Accommodation Specialist	
📄 👥 ♡	HR Admin Update	PERS (HUMAN RESOURCES)	40832202	Benefits Analyst 3 (40832202)	007720	BENEFITS ANL 3 (007720)	Workplace Accommodations Specialist	
📄 👥 ♡	Update (no title change)	PERS (HUMAN RESOURCES)	40036352	Benefits Analyst 4 (40036352)	007721	BENEFITS ANL 4 (007721)	Sr. Workplace Accommodations Specialist	

Single click on any row then click here to view the employee(s) linked to this JD.

Single click on any row then click here to mark JD as a favorite.

Scroll across to see more columns.

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My Employees

1. View a list of the employees (and their JDs) that report directly and indirectly to you.

Narrow your search using the open text search.

Narrow your search using the smart search drop-down filters.

View and org chart of all the jobs that report to you.

Export an Excel version of the grid.

Home Page　　　Jobs that Report to Me　　　**My Employees**

Search

× | Filter ∨ | 🔍　　　　⬤ Direct Reports Only　　　　🔗 Org Chart　　🗐 Export　　△ Reminders　　•••

×

Single click on any row then click here to view details about this employee.

Click OFF to see all direct AND indirect reports.

Job Tasks ∨

Action	Department	Emplid	Position ID	Employee Name	UC Job Cod	UC Payroll Title	V
📇 🔍 ⌗	PERS (HUMAN RESOURCES)		40035047		007720	BENEFITS ANL 3 (007720)	
📇 🔍 ⌗	PERS (HUMAN RESOURCES)		40034410		007720	BENEFITS ANL 3 (007720)	
📇 🔍 ⌗	PERS (HUMAN RESOURCES)		40034541		009558	CNSLNG PSYCHOLOGIST 3 HX (009558)	
📇 🔍 ⌗	PERS (HUMAN RESOURCES)		40071875		004723	BLANK AST 2 (004723)	
📇 🔍 ⌗	PERS (HUMAN RESOURCES)		40071064		004263	ADMIN OFCR 2 CX (004263)	
📇 🔍 ⌗	PERS (HUMAN RESOURCES)		40832202		007720	BENEFITS ANL 3 (007720)	
📇 🔍 ⌗	PERS (HUMAN RESOURCES)		40034934		006859	LEAVE OF ABSENCE MGR 1 (006859)	
📇 🔍 ⌗	PERS (HUMAN RESOURCES)		41033005		007719	BENEFITS ANL 2 (007719)	

Single click on any row then click here to view the employee(s) JD in Form View.

Single click on any row then click here to share this JD with the employee.

Scroll right to see more columns.

Tree View

⊟ **Lisa**

Job Library - Part 1

1. The Job Library lists all the job descriptions in your assigned departments.

Narrow your search using the open text search.

Narrow your search using the smart search drop-down filters.

Click OFF to see all active and inactive jobs (i.e. filled vs. vacant).

Export an Excel version of the grid.

Double click on a row to open up the Form View of the JD.

Scroll down to see more rows.

See next page for an explanation.

Single click on any row then click here to mark the JD as a favorite.

Scroll right to see more columns.

Home Page	Job Library

Search

Filter ∨ 🔍 Advanced | Show Active Jobs Only | Export 🕑 Archives •••

Active Filters: Department Name - PERS (HUMAN RESOURCES) ×
Clear All

Showing 56 of 8553 Records   Max Records 300 ∨

Workflows ∨ Select None Select All Selected: 1

Action	Workflow Status	Last Action App	Last Action Eff	Dept Code	Department Nar	Position ID	System Title	UC Job Code	UC Payroll Title	Working/Business Title
♡		HR Admin Update	9/11/2023	PERS	PERS (HUMAN RESOURCES)	40035501	⊙ Administrative Manager 1 (40035501) Reporting to the Director of Human Resources, this position exercises management responsibility for the Employee Services unit and HR Administrative Operations in Human	000547	ADMIN MGR 1 (000547)	Director of Employee Services
♥		Update	4/1/2024	PERS	PERS (HUMAN RESOURCES)	40071064	⊙ Administrative Officer 2 CX (40071064) Acts independently and with a high degree of initiative to provide budget, analytical, project, and administrative support to Human Resources Department. Using a	004263	ADMIN OFCR 2 CX (004263)	HR Office Manager
♡		Position Mgmt Update	3/25/2024	PERS	PERS (HUMAN RESOURCES)	41078973	⊙ Administrative Officer 2 CX (41078973) Acts independently and with a high degree of initiative to provide budget, analytical, project, and administrative support to Human Resources Department. Using a	004263	ADMIN OFCR 2 CX (004263)	HR and Business Operations Manager

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Job Library - Part 2

Job Library

× Filter ⌄ 🔍 Advanced ● Show Active Jobs Only 📤 Export 🕘 Archives ⋯

Viewed ×   Department Name - PERS HUMAN ×   158 Records   Max Records

None   Select All   Selected: 1   300

Click on the carrot to open another menu

Department Name	Position ID	System Title	UC Job Code	UC Payroll Title	Working/Busine ❭
		administrative professional support to the HR department. Responsible for the campus			Specialist
		Benefits Analyst 2 (40074435)			📄 Preview
PERS HUMAN RESOURCES	40074435	The Leave Coordinator manages, plans and administers the leave	007719	BENEFITS ANL 2 (007719)	Leave Program Coordinator

👥 Employees

Preview the JD for the row you highlighted.

Action	ID	Department Name	Position ID	System Title
♡	41819	PERS HUMAN RESOURCES	40074139	(40074139) The Workfor Specialist pr administrati support to tl Responsible
♡	43034	PERS HUMAN RESOURCES	40074435	Benefits Analy The Leave C manages, p administers processes fc in the ongoi centralized l
♡	43035	PERS HUMAN RESOURCES	40077113	Benefits Analy The Transitic (TWP) Coorc responsible the campus work/transiti for employe

Preview

Default   📄 📄 📄 🔗 🔄   📄 Preview

👥 Employees

UC SANTA BARBARA   BENEFITS ANL 2 (007719) Job Description

Job History/Status
Approved Date:	1/1/1900 12:00:00 AM
Date Last Edited:	9/27/2021 7:00:17 PM
Last Action Approved:	Update
Last Action Effective	9/1/2021

System Title

project, and administ support to Human Res

🔵 Administrative Officer 2 (40074139)

The Workforce Admini Specialist provides a v administrative profess support to the HR dep Responsible for the ca

🔵 Benefits Analyst 2 (400

The Leave Coordinato manages, plans and

Employees   ⋯   ❭

Filter ⌄   📄 Preview

Assign To Employees   Assign to Another Job

View the employee(s) linked to the row you highlighted.

👥 Employees

Action	Emplid	Employee Name	Title and Position ID	Supervisor's Name
📇			Benefits Analyst 2 (40074435)	

Job Catalog

1. Search for and view UCSB staff (non-student) job descriptions.
2. Search by Position ID, Job Code, Job Title, or Job Family

Search by Position ID in the open search text box

Narrow your search using pre-defined search filters

Click on the carrot to view the Job Posting details for the highlighted row.

Double click on a row to view a PDF version of the JD.

Home Page	Job Catalog					

All Department Values   All Payroll Title Values   All System Title Values

Clear All   Found 500 records   Grid View   In-Line View

Department	Position ID	System Title	UC Payroll Title	Working/Business Title	Union Code
		Officer of the Department of Chemical Engineering. Directs			
PERS HUMAN RESOURCES	40035501	Ⓒ Administrative Manager 1 (40035501) Reporting to the Director of Human Resources, this position exercises management responsibility for the Employee Services unit and	ADMIN MGR 1 (000547)	Manager, HR Employee Services	99 - Non-Represented
HASC HSSB ADMIN	40035516	Ⓒ Administrative Manager 1 (40035516) Under the general direction of	ADMIN MGR 1	Director, HSSB Administrative	99 - Non-

◀◀ ◀ 1 / 5 ▶ ▶▶

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My Job Tasks

1. The My Job Tasks Quick Link will only appear on your home page if you have job actions in some state of workflow (drafted, submitted, etc.).

This Quick Link will only be available if you are involved in any active workflows.

The status of all JD actions in workflow will be listed here.

The edit icon allows you to open Form View.

Action	Action Request	Department Name	UC Payroll Title	Working/Business Title	Position ID	Workflow Process
		PERS HUMAN RESOURCES	FINANCIAL SVC ANL 2 (004627)	ⓒ TEST Job 6 for training	TBD_199	My Step: Action Required — Lisa Romero / Linda B...
	Create New JD	PERS HUMAN RESOURCES	ADMIN OFCR 3 (007377)	ⓒ TEST Job 5 for training	TBD_197	Step Approved — Lisa Romero / Current — Kathr...

The Compare Revision icon allows you to see a side-by-side comparison of what's been revised in the JD.

CT Job Standards Matrix

1. View an at-a-glance matrix of all the UC job titles by salary grade and job family.

Click on the carrot to open the vertical Job Family list.

Click on a Job Family to narrow your search of job codes appearing in the matrix.

Hover over the carrots to view the Job Families as they scroll left and right.

Double click on a job title to open a print version of the job standard.

| Home Page | CT Job Standards Matrix |

Search   ✕

Filter ⌄ 🔍   Advanced   ⬤ Show Active Jobs Only

Selected Jobs (0)   Clear Selected

- Facilities Development and EHS
- Finance
- General Administration
- General Services
- Governmental Relations
- Healthcare Strategy
- Human Resources
- Information Technology
- Investment Management
- Legal Services
- Library Services
- Marine
- Medical Imaging
- Museum Services
- Nursing
- Patient Support Services
- Performing Arts
- Physician
- Quality Management
- Radiation Oncology
- Rehabilitation Services
- Research Administration
- Research and Laboratory
- Respiratory Services
- Security and Public Safety
- Skilled Crafts and Trades
- Sports and Recreation

‹ ‹ es Development and EHS   Finance   General Administration   General Services   Governmental Relations   Healthcare Str ›

These functions describe the work performed at the University to support our staff and academic employee resources.

Grade	Academic Human Resources	Benefits	Benefits Pr
Grade 30			BENEFITS PRG STRAT
Grade 28	ACAD HR MGR 3 (000596)	BENEFITS MGR 3 (000290)	BENEFITS PRG STRAT
Grade 27		BENEFITS MGR 2 (000291)	BENEFITS PRG STRAT
Grade 26	ACAD HR ANL 5 (000593) ACAD HR MGR 2 (000595)	BENEFITS ANL 5 (000292)	BENEFITS PRG STRAT
Grade 25	ACAD HR MGR 1 (000594)		BENEFITS PRG STRAT
Grade 24	ACAD HR ANL 4 (007716) ACAD HR SUPV 2 (007711)	BENEFITS MGR 1 (000614)	BENEFITS PRG STRAT
Grade 23	ACAD HR ANL 4 GF (005894)	BENEFITS ANL 4 (007721)	
Grade 22	ACAD HR ANL 3 (007715)	BENEFITS SUPV 2 (007723) BENEFITS SUPV 2 GF (006643)	BENEFITS PRG STRAT
Grade 21		BENEFITS ANL 3 (007720)	

CT Job Standards

1. View or download the CT Job Standards.

Click on the 3-dot menu to bring up a list of CT Job Families.

Search for and select a job function within a job family.

1

Home Page | CT Job Standards

Select Job Function

[...]

View Side-By-Side | Download Job Standards

Click here to see a side-by-side version of the CT Job Standards.

2

Select Job Function

Select and Close

Search/Filter: [   ] 🔍 Clear

- General Services
- ⊞ Governmental Relations
- ⊞ Healthcare Strategy
- ⊟ Human Resources
  - Academic Human Resources
  - Benefits
  - Benefits Program Strategy
  - Compensation
  - Employee Health Services RN

CT Job Standards (continued)

Side-By-Side View ③

Reset | Export as Excel | Edit Profiles

Export this grid to Excel. (pointing to Export as Excel)

Click on the 'x' to hide title columns you don't need to see.

Selected Jobs
11 Jobs Selected

Side-by-Side Profile
Job Standard

☐ Highlight Differences   ☐ Hide Identical Rows

Job Function: Compensation

Involves developing, implementing and administering compensation policies and programs. Reviews job evaluation requests and proposals, and provides advice on job evaluation, position management, and position salary-setting.

Job Family: Human Resources

These functions describe the work performed at the University to support our staff and academic employee resources.

	Compensation Analyst 1 ✕	Compensation Analyst 2 ✕
Classified Indicator Descr (Pers Prog)	PSS	PSS
Job Level	Entry	Intermediate
Salary Grade	Grade 20	Grade 21
FLSA Status	Non-Exempt	Non-Exempt
CT Generic Scope Description	Entry-level professional with limited prior experience; learns to use professional concepts to resolve problems of limited scope and complexity; works on assignments that are initially routine in nature, requiring limited judgment and decision making. Employees at this level are expected to acquire the skills and knowledge to perform more advanced work following an agreed upon time in position, through defined training and development planning.	Professional who applies acquired job skills, policies, and procedures to complete substantive assignments / projects / tasks of moderate scope and complexity; exercises judgment within defined guidelines and practices to determine appropriate action.

Scroll to the right to see all the job titles in this job function.

Scroll down to see all sections of the CT Job Standard.

Add a New Job Description (Create New JD)

1. Add a New JD from a Blank Job Description
   a. Creating a new blank job description allows you to use a template JD that is pre-filled with job code related attributes and information from the Career Tracks job standards.

1 Choose a Template

⊕ Blank Job   or   🔍 Select Base Job

2 Enter in a Working/Business title.

3 Select a template CT job standard to populate the new JD. See next few pages for instructions.

Click on Blank Job to use a CT Job Standard to pre-fill your JD.

Position ID
TBD_202

New Job Title
TEST Job 7 for Training

Unique Job Name
(TBD_202)

Job Standard: Select Job Standard

Select Workflow
Submitter Workflow (2 steps)

A 2 or 3 step workflow will automatically be assigned based on your user role (Preparers have 3 steps, Submitters have 2 steps.)

Department Initiates Action	HR/Comp Reviews
Lisa Romero	Select HR/Compensation
⊕	⊕

4 Click here to assign an HR/Comp Reviewer. See next few pages for instructions.

5 Click here to officially start the Workflow process.

Start Workflow

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Add a New Job Description - Blank Job (continued)

1. This is a continuation of #3 above - select the Job Standard template.

3

Select Parent for the new Job Description

Save and Close

Click the 3-dot menu to bring up a list of CT job standard templates to choose from.

List of CT Job Standards to choose from

Job Standard

`...`

Parent/Child Settings File

UCSB Master Template

`...`

1 Type in the job title or job code that you want.

Select Job Standard for 'TEST Job

Or, use the smart filter to find the job template you want. **1**

Search

| compensation | ✕ | Filter | ⌄ | 🔍 | Advanced | ⬤ | Same Job Family Onl |

3

Save the job standard to be added to your blank job.

elected Job | (TBD_202) | 🗗   Job Family

Job Code | TBD_202   **2** b Function

Job

Click once to highlight the row you want.

Save Job Standard   Side-By-Side

Action	System ID	Job Code	UC Payroll Title	Unabbreviated Payroll Title	Salary Gra
🗗	33419	004500	ACAD ACHIEVEMENT CNSLR 2 (004500)	Academic Achievement Cnslr 2	Grade 19
🗗	33420	004501	ACAD ACHIEVEMENT CNSLR 3 (004501)	Academic Achievement Cnslr 3	Grade 20
🗗	33421	004502	ACAD ACHIEVEMENT CNSLR 4 (004502)	Academic Achievement Cnslr 4	Grade 22

17

Add a New Job Description - Blank Job (continued)

1. This is a continuation of #4 from above - select the HR/Comp Reviewer.

Add Ad Hoc

Emplid	Employee Name	Reports To	Is JD Manager?	Is Indirect Mgr?	Is JD Admin?	Is J
10039591	Broen,Linda Carolyn	Moore,Kathryn Poling	False	False	True	Fals
10080169	Dittman,Andrea	Moore,Kathryn Poling	False	False	False	Fals
10260836	Fudge,Anna Katherine	Moore,Kathryn Poling	False	False	False	Fals
10072173	Hudgens,Deborah Lynn	Moore,Kathryn Poling	False	False	False	Fals
10071707	Ibach,John Thomas	Moore,Kathryn Poling	False	False	False	Fals
10037304	Moore,Kathryn Poling	Romero,Lisa G	False	False	True	Fals

Click once on a row to highlight the HR/Comp Reviewer.

Click here to add the HR/Comp Reviewer to the workflow process.

Add Participant

Click here to officially start the Workflow process.

Start Workflow

Job Workflow Start Report

Job Revision Workflow(s)

Action	Job	Details
	Compensation Analyst 2 (TBD_203)	Revision was started.

Click on the View/Edit icon to open up the Workflow process. This will allow you to begin editing the job description.

----> **Skip to Job Description Workflow Process**

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Add a New Job Description - Base Job

2. Add a New JD from a Base Job Description
   a. Creating a new job description from a base job description (current JD in the job catalog) enables the automatic copying of many sections and fields into your new job description.

1

Choose a Template

⊕
Blank Job

or

🔍
Select Base Job

Click here to select an existing job in the UCSB job catalog to pre-fill your JD.

2

Search Content Library

Search Jobs for

✕   All Job Families and Job Functions   ⌄   🔍

Search for an existing JD by typing in the position ID, job code, or payroll title name.

Use the smart filters to search for an existing JD by job family or function.

Search in Results

✕   ⌄   🔍   No Jobs to Display

Add a New Job Description - Base Job (continued)

By typing in a payroll title, the system presented search results based on the closest matches to this title.

3

Search Content Library

Search Jobs for

financial services analyst 2 ☒ | All Job Families and Job Functions ⌄ | 🔍 | Reset Search | Found 50 Jobs | 🖫 Sources | ⑦ Help

Financial Work-Study Analyst | Financial Analyst | TEST Training Job Financial Analyst | Special Projects-Senior Financial Analyst

Financial Services Analyst 3

Search in Results

☒ | Filter ⌄ | 🔍 | 50 Jobs Displayed

The General Summary for the UCSB job highlighted is displayed here.

"Company Jobs" is another name for UCSB jobs.

Financial Work-Study Analyst	Company Jobs
Financial Analyst	Company Jobs
TEST Training Job Financial Analyst	Company Jobs
Special Projects-Senior Financial Analyst	Company Jobs
Financial Services Analyst 3	Company Jobs

Hover over a title to see the Position ID and General Summary.

Financial Work-Study Analyst

Reporting to the Fiscal Analyst, assists the Fiscal Operations unit in meeting its goal of providing sound oversight of Federal, State and Institutional student aid funds. Reconciles major Federal Title IV student aid program accounts (PELL, TEACH, DL, Perkins Work-Study) and processing

Scroll down to see all jobs listed.

Click here once you've made your selection.

Save and Close

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Add a New Job Description - Base Job (continued)

A temporary number is assigned to the JD until you request a Position ID.

Enter in the unique Working/Business Title for your JD.

4

This is the CT job standard that will auto-populate your JD, in addition to the other fields that will be copied over.

Position ID
TBD_205

New Job Title
TEST Job 3 for Training

Unique Job Name
Financial Services Analyst 2 (TBD_205)

Job Standard: FINANCIAL SVC ANL 2 (004627)

Select Workflow
Submitter Workflow (2 steps)

A 2 or 3 step workflow will automatically be assigned based on your user role (Preparers have 3 steps, Submitters have 2 steps.)

Department Initiates Action	HR/Comp Reviews
Lisa Romero	Andrea Dittman
⊕	⊕

Because you selected a JD from the UCSB job catalog, the HR Comp Reviewer is copied over. This will change later once you assign a different department to this new JD.

Click here to officially start the Workflow process.

Start Workflow

Job Revision Workflow(s) **5**

Action	Job	Details
📝 ▤	Financial Services Analyst 2 (TBD_205)	Revision was started.

Click on the View/Edit icon to open up the Workflow process. This will allow you to begin editing the job description.

----> **Skip to Job Description Workflow Process**

Revise a Job Description (Update, Reclass, Stipend)

1. Use the "Revise a Job Description" action for JD updates, reclasses or temporary stipends.

1 — Click here to bring up a search window of all the JDs in your assigned

2 — Search for the JD you wish to revise using the text box or smart filters.

3 — Click once to highlight the JD you wish to revise.

4 — Make sure you've only selected one JD.

5 — Click here to continue.

Selected Job(s)

Action	Job ID	Job Code	Job Name	Version	Add Job

Search

TEST job   ✕   Filter ∨   🔍   Advanced

Uncheck All

	ID	Position ID	UC Payroll Title	Working/Business Title	Department	Num EEs	Version	Current Reviewer
☐	56909	TBD_153	ADMIN OFCR 3 (007377)	TEST Job for Training		0	0	
☐	60652	TBD_162	ADMIN OFCR 3 (007377)	TEST Job 2 for training		0	0	Moore,Kathryn F
☑	60654	TBD_163	ADMIN OFCR 3 (007377)	TEST Job 3 for Training		0	0	
☐	60911	TBD_186	ADMIN OFCR 3 (007377)	TEST Job for Training		0	0	
☐	60921	TBD_197	ADMIN OFCR 3 (007377)	TEST Job 5 for training		0	0	Moore,Kathryn F

Selected Jobs (1)

Administrative Officer 3   ✕

Select and Close

Revise a Job Description (Update, Reclass, Stipend) (continued)

Confirm that this is the correct JD you want to revise.

Selected Job(s)

Action	Job ID	Job Code	Job Name	Version
🔍 🗑	60654	TBD_163	Administrative Officer 3 (TBD_163)	0

Add Job

A 2 or 3 step workflow will automatically be assigned based on your user role (Preparers have 3 steps, Submitters have 2 steps.)

Select Workflow

Submitter Workflow (2 steps)

Department Initiates Action	HR/Comp Reviews
Lisa Romero	Kathryn Moore
⊕	⊕

Click here to officially start the revision workflow process.

Start Workflow

----> **Skip to [Job Description Workflow Process](#)**

Job Description Workflow Process

1. The Job Description workflow process consists of 14 sections, 12 of which require editing.

Section 1 - Job Details

Red Dots indicate there are required fields that need to be filled out in that section.

These are all the different sections of the workflow process.

AB Spell check   Employees   Preview Pane   Split Screen   ⚠ Form Errors (47)   •••

Save and Close   Discard Draft   Workflows ∨

This Job is in Workflow: Action Required

TEST Job 3 for Training   🟢 Edit

1 Click the Edit button to begin editing this JD.

Scroll down to complete all parts of the section.

- Job Details
- Supervision
- Job Summary
- Essential Functions
- Qualifications
- Competencies
- Classification Factors
- PEM Requirements
- Conditions of Employment
- Action Justification
- Temp Assignment/ Stipend
- Comp Information
- Workflow Approvals
- Job Posting

Please remember to save your work

JOB DETAILS

Job History/Status

Archive this Job Description?	No
Approved Date:	1/1/1900 12:00:00 AM (PST)
Date Last Edited:	1/1/1900 12:00:00 AM (PST)
Last Action Approved:	Update
Last Action Effective Date:	9/1/2021 •••
Action Requested:	

2 Use the drop down to select the type of action you're requesting (i.e. Create New JD, Update, Reclass, etc.).

Organization Details

Business Unit (Location):	SBCMP
Department Name:	DEVL DEVELOPMENT •••
Division Name:	Instl Advcmt
Sub-Division:	n/a
Department Marketing	

3 Click here to assign the correct dept for this JD.

Always save your work before moving to the next section in workflow.

Previous   Next   Save

24

Section 1 - Job Details (continued)

Position Details

Position ID: TBD_162

? Proposed Position ID:

UC Payroll Title: ADMIN OFCR 3 (007377)

UC Job Code: 007377

? System Title: Administrative Officer 3 (TBD_162)

Working/Business Title: TEST Job 2 for training

CT Job Family: General Administration

CT Job Function: Administrative Operations

Classified Indicator Descr (Pers Prog): PSS

Salary Grade: Grade 22

FLSA Status: Exempt

? FLSA Override:

Employee Class (Appt Type): 2 - Staff: Career

Rehired Retiree? No

Union Code (Collective Bargaining Unit): 99 - Non-Represented (PPSM)

ERC (Empl Rels Code): E-All Others - Not Confidential

? % of Time (i.e. 100, 75, 43.5): 100

Working Days and Hours: M-F; 8-5pm

Work Location (building, office, room number, cubicle): Cheadle Hall - 4219, cubicle 6

Click or hover over the help bubbles for more information.

4 Continue filling out all editable fields.

25

Section 1 - Job Details (continued)

Eligible for Remote Work? Yes

Type of Remote Work Arrangement: Hybrid (Both UC & Non-UC locations)

Use to view and edit Job Descriptions from this Job Function side-by-side:

View Side-by-Side: Financial Services

Show Side-by-Side View

Click here to view the Side-by-Side comparison of jobs this Job Family

Previous   Next   Save

5 When you get to the end of the section, be sure and save your work before continuing on to the next section.

Click here to return to the section WITHOUT SAVING.

Click here to SAVE your work and return to the section.

6

Continue Editing   Close Form with Errors

One or more errors were detected.

If you missed any required fields they would be listed here, in order by section.

Tab Page	Element/Field	Error Message
Job Details	Action Requested:	Action Requested:
Supervision	Supervisor's Payroll Title:	Supervisor's Payroll
Qualifications	Work Experience	Work Experience is
PEM Requirements	Physical Requirements [Crawling, 7]	Physical Requireme

26

Section 2 - Supervision

SUPERVISION

Click or hover over the help bubbles for more information.

Name of Supervisor: Kathy Moore

Supervisor's Payroll Title: Compensation Manager 1

Name of Department Head: Vacant (TBD)

1 Manually enter name of supervisor, their PAYROLL title, and name of dept head.

ⓘ **Level of Supervision Received**

A statement which describes the level of independence for this position. Check only ONE of the following boxes.

☐ CLOSE SUPERVISION

☐ SUPERVISION

☐ GENERAL SUPERVISION

☐ DIRECTION

☑ GENERAL DIRECTION

2 Select the level of supervision received.

3 Manually add the names, payroll titles, and % of time for every CAREER employee supervised.

Names and Payroll Titles of Career Employees Directly Supervised

Add   Delete Row   Undo

Name	Payroll Title	% of Time
John Doe	Compensation Analyst 3	100
Jane Smith	Compensation Analyst 3	100

Legacy Names and Payroll Titles of Career Employees Supervised

Add   Delete Row   Move Up   Move Down

N/A

This legacy section contains information imported from OACIS that needs to be copied and pasted into the proper sections on this page.

Other Positions Supervised (limiteds, contracts, and students)

4

? Other Positions Supervised (Contract, Limited, Student Assistants, etc.)

Blank Assistant 2, 50%, Limited
1-3 Student Assistants

Enter other non-career positions supervised.

5 SAVE your work before continuing on.

Previous   Next   Save

27

Section 3 - Job Summary

JOB SUMMARY

General Summary of Job Duties and Responsibilities

(i) Content Library   Full Screen

Financial & Business Operations Analyst Under the general direction of the Associate Business Operations Analyst ("Analyst") plays a key role in the efficient functioning of the departments Office of Public Affairs and Communications ("OPAC"). Primary responsibilities focus on Supplies & Expe reporting and, office operations for DEVL ($1.5M+ annual S&E) & OPAC ($225K+ annual S&E). Business Manager, maintains database of all departmental expenditures, completes monthly rec monthly expense reports and summaries. Serves as the back-up to the Associate Business Manager and Financial sts Business and Financial unit for the Division of Institutional Advancement ("IA") with the coordination of departmental Time Leave requests, and maintains departmental personnel files. Assists the Associate Business Manager and the entire Business & Financial Operations team with the day-to-day departmental financial and office operations support. Ensures financial control in all aspects, payroll, vendor contracts and payments, financial paperwork, travel and entertainment. Communicates with development staff, vendors and campus providers with a

1 Enter or revise the general summary of duties unique to this JD.

CT Job Function Summary

Involves the processing and servicing of a variety of operational, personnel, and financial tra payroll, accounts receivable, accounts payable, purchasing, recharge billing, travel / enterta collection and data entry, analysis, review and control, customer servicing, and reporting.

2 OPTIONAL: Click on Content Library to search a large database of general summary statements related to this JD.

CT Generic Scope Description

Professional who applies acquired job skills stantive assignments / projects / tasks of moderate scope and complexity; exercises judgment determine appropriate action.

The grey shaded areas are auto-filled based on the payroll title of the JD and are there for your reference only.

CT Custom Scope Description

Uses professional financial services concepts. Applies organization policies and proce to resolve a variety of moderately complicated issues. Works on financial services problems of moderate scope where analysis of sit ns or data requires a review of a variety of factors.

3 SAVE your work before continuing on.

Previous   Next   Save

Section 4 - Essential Functions and Duties

The key responsibilities from the CT Job Standard are here for your reference only. You can copy and paste whatever applies to your unique JD.

Right click on a row to copy and paste it to the editable duties section below.

ESSENTIAL FUNCTIONS AND DUTIES

For Reference Only - Key Responsibilities from CT Job Standard

- Applies professional financial and accounting concepts to independently perform services such as researching discrepancies and tax implications and compliance
- Prepares reports and analyses to include summaries of financial transactions, e for management review and decision-making.

1 Manually add/revise functions and duties.

2 Cut and paste duty statements from the Key Responsibilities above or from the Content Library.

ⓘ Essential Functions and Duties Total Percentage:100%

3 Make sure %'s add up to 100%.

Add   Delete   Move Up   Move Down   Paste List   Content Search   ...

Duties are listed in order of greatest importance. Other responsibilities may be assigned.

Order of Importance	Function	Duties		% TIME
1	Financial Analysis & Reporting	TEST TEST TEST	☰ 🔍	70 ∨
2	Business Operations Support	TEST TEST TEST	🔍	30 ∨

Add New Row   Manage Rows

OPTIONAL: Click on Content Library to search a large database of duty statements related to this JD.

Non-Essential Duties

4 Non-essential duties are peripheral, incidental, or minimal duties that would not adversely affect the job if removed.

Add   Delete Row   Move Up   Move   Paste List   Content Search   ...

Non-essential duties are a peripheral, incidental or minimal part of a job that if removed would not adversely affect the job.

Other Requirements - Applies to all Positions

- Performs other duties as assigned
- This job description is not intended to be a complete list of all responsibiliti... d is subject to review and change at any time, with or without notice, in accor...
- Complies with all policies and standards
- Complies with all principles of community at the University of California, Santa Barbara. UCSB is a diverse community comprised of individuals having many perspectives and identities. We come from a multitude of backgrounds and experiences, with distinct needs and goals. We recognize that to create an inclusive and intellectually vibrant community, we must understand and value both our individual differences and our common ground. The UCSB Principles of Community embodies this commitment, and reflects the ideals we see...

The "Other Requirements" section is not editable and applies to all positions.

5 SAVE your work before continuing on.

Previous   Next   Save

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Section 5 - Qualifications

QUALIFICATIONS

View Job Posting

After entering data in the Qualifications fields below, SAVE the job description and click on the View Job Posting button to see how the qualifications you entered will appear on the Job Posting for Financial Services Analyst 2 (TBD_205)

For Reference Only - Education Requirements from CT Job Standard

Education Level

Required/ Preferred

If there are any education requirements for this job title, they will be listed here for reference.

Bachelor's degree in related area and / or equivalent experience / training.

Required

Education Requirements for this Position

Add   Delete Row   Move Up   Move Down   Paste List   Export   ...

1 — Manually add/revise education requirements.

Cut and paste from the reference section if applicable.

List the education requirements for this position.

Education Level	Education Details	Required/ Preferred	And/Or
Bachelor's Degree	or equivalent combination of education and experience.	Required	

2 — Add work experience that you require for this position.

Work Experience

Add   Delete Row   Move Up Row   Move Down Row   Content Search   Refresh   ...

Click on Content Search to view recommendations for years of experience to require.

List the Experience Requirements for this position.

Experience	Experience Details	Required/ Preferred	And/Or
1-3 years	TEST TEST TEST	Preferred	

3 — Right click on a row to copy and paste KSAs to the editable section below -or- add unique KSAs.

For Reference Only - Knowledge, Skills and Abilities from CT Job Standard

KSAs

The KSAs from the CT Job Standard are here for your reference only. You can copy and paste whatever applies to your unique JD.

Working knowledge of financial processes, policies and procedures.

Strong knowledge of financial data management and reporting systems.

Knowledge, Skills and Abilities for this Position

Add   Delete Row   Move Up Row   Move Down Row   Paste List   Content Search

Copy and paste the Knowledge, Skills and Abilities from above that apply to this job and/or create new KSAs for this position.

Click on Content Search to view KSAs related this JD.

KSAs

Strong organizational skills and unfailing attention to detail and accuracy.

Section 5 - Qualifications (continued)

Licenses and Certifications

Add   Delete Row   Move Up Row   Move Down Row   Refresh   Undo

Required Licenses and Certifications for this position are listed below. Add additional licenses that might apply. Type N/A if not applicable.

Licenses/Certification Details	Required/ Preferred
N/A	

Add license(s) and certifications that you require for this position. **4**

Add New Row   Manage Rows

For Reference Only - Legacy KSAs and Other Qualifications

The legacy section contains the information imported from OACIS that needs to be copied and pasted into the proper sections on this page.

- Bachelor's degree or equivalent combination of education and experience. - Strong o   tail and accuracy. - Exceptional verbal and interpersonal skills that foster positive relatio   ter skills including proficiency in Word, Excel, PowerPoint, Internet and e-mail and demo   programs and application portals. - Ability to work independently. - Ability to maintain str   ility to prioritize duties and achieve planned goals for a large and busy unit. - Ability to work unde   to effectively solve problems and demonstrate sound reasoning and judgment. - Ability to establish and   in co   e working relationships within the division of Institutional Advancement, the Development Office and with the broader campus community. - Ability to interpret policies and procedures and accurately communicate them to others. - Prior experience in using databases including Access. - Prior experience with financial programs a must.

SAVE your work before continuing on.

Previous   Next   Save

Section 6 - Competencies

UC Core Competencies

The core competencies below apply to all UC staff employees, regardless of location, lev
the mission, vision and values of the University and its locations.

Achieving Results through Continuous Improvement	Strives for high-quality performance in self and the organization. Takes initiative improve products, services or processes to deliver optimum results. Is resourceful, seeks alternatives and broad input; measures outcomes.
Achieving Results through Continuous Learning	Demonstrates responsibility and ownership for one's job and career path by identif skillsets needed to perform essfully on the job. Consistently works to learn a Asks fo pen to feedback.

UC Core Competencies are not editable and apply to all staff positions.

1 Click here to open the Functional Competency chart.

Functional Competencies

Competencies · Delete Row

Identify the Functional/Technical Competencies that a person must have in order to be successful in this role. These s
the UC Core Competencies.

Competency	Level	Competency Description
Analytical Thinking	2. Novice	Practices investigative techniques to determine the best approach.
Functional Knowledge	1. Entry	Knowledgable about his/her specific job.
Collaboration	2. Novice	Creates internal alliances outside the immediate team or department.

2 Click on each box that applies to add functional competencies and Interview questions.

Save and Close

Competency Name

[...]

[✕] [🔍] Reset

Clear Selected   Show Selected Items: 5

Competency Title	1. Entry	2. Novice
Analytical Thinking	Uses basic logic and common sense to arrive at solutions.	Practices investigative t determine the best appr
Business Impact	Role has impact on the department.	Responsible for the tea and objectives.
Collaboration	Develops partnerships with internal team members.	Creates internal allianc immediate team or depa

Interview Questions

Below are suggested interview questions associated with the Functional Competencies selected above. These questions can be rated on a 1-5 scale if desired.

Competency	Level	Interview Question	Rating
Analytical Thinking	2. Novice	How do you determine the best process for handling a new task?	∨
Functional Knowledge	1. Entry	How do you gain the knowledge to do your job?	∨

Interview questions are auto-populated based on the Functional Competencies selected above.

3 SAVE your work before continuing on.

[Previous] [Next] [Save]

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Section 7 - Classification Factors

This section is required for ALL job description actions.

1 Freedom To Act

Select a statement that describes the level of independence for this position.

☐ Work is closely managed and reviewed for accuracy and adequacy. Follows specific, outlined and detailed directions.

2 Problem Complexity and Problem Solving Timeframes

Select a statement to describe how clearly a problem is defined when presented and how much a[...] understand the nature of the problem. Additionally reflects typical timeframes associated with resolving proble[...]

☐ Provides resolution to problems that are readily identifiable with limited scope[...] accordance with standard practices, procedures, applications or routines. Pr[...] timeframe: The majority of tasks typically take one to two days to resolve.

3 Impact

Select a statement that describes the impact to the organization of contributions, decisions, recom[...] by the incumbent.

☐ Failure to accomplish results can normally be overcome without significant effect[...]

4 Contact with Others

Select a statement that describes the level, structure (internal and/or external) and nature of interface the role possesses.

☐ Contacts are primarily with direct supervisor and others in group or department to give and receive information.

For each of these classification factors, select the statement the best describes your expectation of this position.

Section 7 - Classification Factors (continued)

Financial Responsibilities

(1) Complete this section if the position has any financial responsibility.

Financial Controls

For any financial figures being reported, base it on the previous year.

☐ This position has responsibility for setting up and maintaining financial control systems and standards for the department

(2) ☑ This position has authority to approve small, moderate, or significant financial expenses

☐ This position has authority to delegate staff roles and responsibilities in campus business and financial systems

- Small
- Moderate
- Significant

Budgetary Responsibilities (previous fiscal year)

(3) Complete this section if the position is responsible for overseeing or managing the day-to-day financial operations of a unit, department, or division.

Financial Category	Scope of Budgetary Responsibility	Approximate Annual Value	Other Information and Comments
☐ Total Permanent Operating Budget			
☑ Total Annual Expenditures	Department	$1,500,000	test
☐ Recharge and Income Revenue			
☐ Gifts and Endowment Income			
☐ Contract and Grant Funds Awarded			
☑ Special Program Funding	Program	$150,000	test
☐ Faculty Start-Up Funding			
☐ Other (please explain)			

Check each box that applies and fill out the corresponding scope, value, and other information.

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Section 7 - Classification Factors (continued)

For any financial figures being reported, base it on the previous fiscal year.

Contracts and Grants (previous fiscal year)

Complete this section if the position is responsible for overseeing or administering Contracts and Grants.

4

Type of Responsibility	Approximate Number	Approximate Annual Value	Other Information and Comments (i.e. Granting Agency name, complexity of grant)
☑ Proposals Prepared and Submitted	6	$17,500,000	test test test
☑ Grants Awarded (Post-Award Admin: Set Up, Manage, Close-	4	$9,500,000	test test test

Check the boxes that apply and fill out the corresponding fields.

5 Other Financial Information

test test test

Indicate here any other important financial responsbilities that might apply to this position.

SAVE your work before continuing on.

Previous   Next   Save

Section 8 - PEMs (Physical, Environmental, and Mental Requirements)

PHYSICAL, ENVIRONMENTAL, AND MENTAL (PEM) REQUIREMENTS

A thorough completion of this section is needed for compliance with legal standards such as the Ameri[...] [...]ay be made to enable individuals with disabilities to perform the essential functions of the job.

> Go through and answer all the Physical, Environmental, and Mental Requirements (PEMs) for this position, including whether or not it is essential to the job.

ⓘ Physical Requirements

1

Reset to Default   Undo

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Physical Requirements	Never 0 Hours	Occasional Up to 3 Hours	Frequent 3 to 6 Hours	Continuous 6 to 8+ Hours	Is Essential
Standing	○	◉	○	○	☑
Walking	○	◉	○	○	☑
Sitting	○	○	◉	○	☑

Other Physical Requirements

2 If "Body Positions Other" or "Climbing Other" were selected above, please explain:

test test test

ⓘ Environmental Requirements

3

Reset to Default   Undo

The environmental requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Exposures	Never 0 Hours	Occasional Up to 3 Hours	Frequent 3 to 6 Hours	Continuous 6 to 8+ Hours	Is Essential
Background noise	◉	○	○	○	☐
Chemicals or toxic substances	◉	○	○	○	☐
Combative patients	◉	○	○	○	☐

Section 8 - PEMs (Physical, Environmental, and Mental Requirements)

4 **Blood/Fluid Exposure Risk**

Indicate any blood/fluid exposure risk for the position.

- ☐ Category 1: Tasks involve exposure to blood, fluids or tissue.
- ☐ Category 2: Usual tasks do not involve exposure to blood, fluids or tissues but job may require performing unplanned Category 1 tasks.
- ☑ Category 3: Tasks involve no exposure to blood, body fluids or tissues. Category 1 tasks are not a condition of employment.

5 **Mental Requirements**

Reset to Default   Undo

Indicate the Mental Requirements for the position.

The mental requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.

Exposures	Never 0 Hours	Occasional Up to 3 Hours	Frequent 3 to 6 Hours	Continuous 6 to 8+ Hours	Is Essential
Oral communication	○	⦿	○	○	☑
Perform calculations	○	⦿	○	○	☑
Read/Comprehend	○	⦿	○	○	☑

6 **Travel Requirements**

Estimated Amount   Brief Description

| 5% ∨ | test test test |

Select an approximate % of time from the drop-down list.

SAVE your work before continuing on.

Previous   Next   Save

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Section 9 - Special Conditions of Employment and Reporting Requirements

SPECIAL CONDITIONS OF EMPLOYMENT AND REPORTING REQUIREMENTS

Essential Elements of Critical Positions

(1) Some positions are defined as "critical" and require a background check. Please check all of the boxes that apply below. For more information on critical positions and background checks, type in "background checks" on the HR website at hr.ucsb.edu.

- ☐ Master key access to University-owned residence and/or other facilities
- ☑ Direct responsibility for the care, safety and security of humans or animals; or the safety and security of personal or University property
- ☑ Direct access to, or responsibility for, cash and cash equivalents or University property disbursements or receipts
- ☐ Direct access to, or responsibility for, controlled substances or hazardous materials
- ☐ Extensive authority for committing the financial resources of the University
- ☐ Responsibility for operating commercial vehicles, machinery or toxic systems that could cause accidental death, injury or health problems
- ☐ A requirement for a professional license, certification or degree, the absence of which would expose the University to legal liability and/or adverse public reaction
- ☐ Direct access to, and/or responsibility for, information affecting national security
- ☑ Direct access to, and/or responsibility for, protected, personal, or other sensitive data
- ☐ N/A   ← **If none of the above applies, click N/A.**

Section 9 - Special Conditions of Employment (continued)

Reporting and Background Check Requirements

2 Per PPSM policy, a position that is defined as "critical" requires a background check. Please check all of the boxes that apply below. For more information on background checks, type in "background checks" on the HR website at hr.ucsb.edu.

- ☑ Criminal history check (U02): Satisfactory completion of a criminal history background check
- ☐ CANRA (U13): Mandated Child Abuse Reporter
- ☐ Clery Act (U15): Campus Security Authority
- ☐ Credentials Verification (U06): For clinical practitioner
- ☑ Driver's License (U08): Must maintain valid CA DL, a clean DMV record and enrollment in DMV
- ☐ Form 700 (U16): Statement of Economic Interest Filer
- ☐ Works in patient care environment
- ☐ N/A

If any of the Essential Elements of a Critical Position were checked in the above section, you will be required to check the Criminal History Background

If none of the above applies, click N/A.

Special Training Requirements

3 Some positions require SPECIAL TRAINING in addition to the mandatory training requirements that apply to all positions. Please check all of the special training boxes that apply below.

- ☐ F: Form 700 Filers (statement of economic interest). Applies to employees who make or influence governmental decisions and ensures no conflict of interest for designated officials.
- ☐ G: Ethics and Compliance Briefing for Researchers. Applies to all UC researchers, as defined by UCOP.
- ☐ L: Clery Act (Campus Security Authority). Applies to employees responsible for campus security, individuals to which students and employees should report criminal offenses, or employees with significant responsibility for student and campus activities.
- ☐ M: ANRA Mandated Reporting. Applies to Mandated Reporters who are individuals whose duties bring them into contact with children regularly or who supervise staff whose duties bring them into contact with children regularly.
- ☐ R: NSF RCR. Applies to all undergraduate students, graduate students, postdoctoral researchers, faculty, and other senior personnel on research projects supported by National Science Foundation awards.
- ☐ S: Sexual Harassment Training for non-HEERA supervisors. Applies to employees who supervise less than 2.0 career FTE and/or only supervise other non-career employees in student, limited or contract appointments. If an employee has an ERC of A,B,C, or D, you do NOT need to check this box.
- ☐ B: NSF RCR Exempt. Applies to employees exempt from Responsible Conduct in Research training. Checking this box requires approval from the UCSB Office of Research Integrity (https://www.research.ucsb.edu/research-integrity/rcr).
- ☐ E: Exempt from Sexual Harassment Training for HEERA Supervisors. Applies to employees who supervise 2.0 or more career FTE yet aren't required to take the SHP training for supervisors. Checking this box requires approval from the UCSB Office of Title IX and Sexual Harassment Policy Compliance (https://titleix.ucsb.edu/about/contacts).

Section 10 - Action Justification

If this section contains historical information, press the CLEAR button prior to entering new information.

Clear Action Justification Page

Information from previous actions will carry forward to new actions so click here to create a blank slate.

ACTION JUSTIFICATION

1

| Submitters Name | Kathy Moore |
| Submitters Phone | 805-893-7137 |

Enter the name of the person submitting the action and the best phone number to reach them.

| Compensation Reviewer Assigned | Kathy Moore |

Is this action being performed for the purpose of recruitment?   Yes

This helps HR prioritize the action.

Is this a Temporary Stipend Action? If Yes, skip the remainder of this section.   No

If answers to the questions below are insufficient or the fields are left blank, the action may be returned to the submitter. HR requires this information in order to adequately evaluate the requested action.

If this is a LIMITED or CONTRACT position, what are the approximate begin and end dates of the appointment?

n/a

FOR ALL ACTIONS: Please explain the basis for submitting this job description for review.

test test test

2

Complete each question so that HR/Comp has a clear picture of why you're submitting this action.

FOR ALL ACTIONS: Please explain the basis for submitting this job description for review.

test test test

FOR ALL ACTIONS: Please include any helpful information such as background and context to explain your proposal.

test test test

FOR ALL ACTIONS: Explain how the new duties evolved. For instance, are they new to the department? Were they previously done by another employee? Are they an expansion of the employee's current duties? Enter N/A if this question not applicable.

test test test

40

Section 10 - Action Justification (continued)

3

ⓘ FOR ALL ACTIONS: If duties have been removed or redelegated, please explain.

> test test test

Complete each question so that HR/Comp has a clear picture of why you're submitting this action.

FOR RECLASS ACTIONS: Are the new duties currently being performed by the employee? → Yes

FOR RECLASS ACTIONS: Do a majority of the duties (more than 50%) align with a different or higher classification level? → No

ⓘ FOR RECLASS ACTIONS: If scope, complexity, percent of time or frequency has changed, but the duties are essentially unchanged, explain here.

> test test test

FOR ALL ACTIONS: Other comments to Compensation.

> test test test

Approvals

4

Have you received all required divisional pre-approvals before submitting this action?

Department Head Name and Date:
> [Name] [Date]

Please make sure to follow the approval process for your division and control points before submitting an action to HR.

Control Point Name and Date:
> [Name] [Date]

Attachments

5

Please attach the following:

- Current or proposed Organizational Chart (if you're requesting a reclassification or new position)
- Divisional approval form (if applicable)
- Other documentation to support your request.

SAVE your work before continuing on.

Document Name:

Upload...   Download...   Delete Document   Refresh

Previous   Next   Save

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Section 11 - Temporary Assignment/Stipend

If the answer to this question was YES on the Action Justification section, the following questions will appear on the Temporary Assignment/Stipend section.

Is this a Temporary Stipend Action? If Yes, skip the remainder of this section.   Yes ▾

If this section contains historical information, press the CLEAR button prior to entering new information.

Information from previous actions will carry forward to new actions so click here to create a blank slate.

Clear Temp Assignment/Stipend Page

TEMPORARY ASSIGNMENT/STIPEND

Skip this section unless you're adding temporary duties. Section will be blank if you answered No to the Temporary Assignment question in the previous section.

1

? Begin Date of Temp Assignment   ...
? End Date of Temp Assignment   ...
? Revised End Date of Temp Assignment   ...

Indicate the begin and end dates of the temporary assignment.

Tip: Don't forget to enter a proposed stipend amount on the next tab.

If answers to the questions below are insufficient or left blank, the action may be returned to the submitter. HR requires this information in order to adequately evaluate the requested action.

Briefly describe the basis or reason for this temporary assignment.

Complete all the questions on the Temporary Assignment section.

2

Provide a detailed description of the duties and responsibilities to be performed on a temporary basis. Include enough detail for the Compensation Reviewer to be able to identify the appropriate classification and level of the work.

% of time to be spent on temporary duties.

42

Section 11 - Temporary Assignment/Stipend (continued)

If the duties came from another employee's job, include employee's name and payroll title.

Are the temporary duties classifiable at a higher level per the Career Tracks Job Standards / Series Concepts, or are they at the same level but significantly different than what the employee normally performs? Please explain.

3

Complete all the questions on the Temporary Assignment section so that HR/Compensation can properly assess eligibility for a stipend.

In addition to the temporary duties, will the employee continue to perform all of their regular duties? Please explain.

If No, what duties will be temporarily suspended or re-assigned? Please explain.

Additional information to support the need for a temporary stipend.

SAVE your work before continuing on.

Previous   Next   Save

Section 12 - Compensation Information

If this section contains historical information, press the CLEAR button prior to entering new information.

Clear Comp Information Page

Information from previous actions will carry forward to new actions so click here to create a blank slate.

COMPENSATION INFORMATION

Skip this section unless you're proposing a reclass increase or temporary stipend.

Salary Info For Reclass And Temporary Stipend Actions

For all fields, please indicate hourly rates for BW employees and annual rates for MO employees.

Current Salary/Pay Rate	$28.50
Effective Date of Current Salary/Pay Rate	7/1/2023 ...
Proposed reclass percentage increase (i.e. 5, 10, 15)	10
Proposed New Salary/Pay Rate (reclasses only)	$31.35
Proposed New Step/Grade (reclasses only)	19
Proposed stipend amount (enter a pro-rated monthly or biweekly amount)	$0.00
Proposed stipend percentage (i.e. 5, 10, 15)	
Have you considered the impact of the above salary increase on other employees in your department?	Yes
Fund Source Information	19900

1 If you're proposing a reclass or stipend, complete the fields in these sections.

HR Approved percentage increase	10
⑦ HR Approved new salary (reclasses only)	$31.35
⑦ HR Approved Stipend Amount	$0.00

Once HR has reviewed and approved the action, the final approved increase and salary will be reflected here.

Please provide a detailed justification or other comments to support the proposed compensation for this action.	test test test

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Section 12 - Compensation Information (continued)

Grade And Salary Range Info

Salary Plan	CTSB
Grade	Grade 19
Hourly Range Min	$24.62
Hourly Range Midpoint	$33.00
Hourly Range Max	$41.33
Annual Range Min	$51,400
Annual Range Midpoint	$68,900
Annual Range Max	$86,300

The Grade and Salary Range Info section is for reference only.

SAVE your work before continuing on.

Previous Next Save

Section 13 - Workflow Approvals

WORKFLOW APPROVALS

Approvals

Step Name	Step Approver	Approval Date	Step Status
1. Department Initiates Action (Active)	Lisa Romero	[N/A]	NotStarted
2. HR/Comp Reviews	Andrea Dittman	[N/A]	NotStarted

Reviewer Comments

The Workflow Approvals section is for reference only and contains the latest information about the stage of progress of the JD action and who's involved.

SAVE your work before continuing on.

Previous Next Save

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Section 14 - Job Posting

JOB POSTING

Payroll Title: COMPENSATION ANL 3 (007726)

Job Code: 007726

Job Open Date:

Application Review Begins:

Department Code (Name): TEST (TEST DEPARTMENT)

Percentage of Time: 100

Union Code (Name): 99

Employee Class (Appointment Type): Staff: Career

FLSA Status: Exempt

Classified Indicator Description (Personnel Program): PSS

Salary Grade: Grade 23

Hiring/Budgeted Salary or Hourly Range: The budgeted salary range that the University reasonably expects to pay for this position is $_____ to $_____/year.

Full Salary Range: The full salary range for this position is $_____ to $_____/year. Salary offers are determined based on final

Scroll down to see the full Job Posting template. Copy this whole section (select-all) and paste into the TAM job posting section.

After you cut and paste this section to TAM, you can manually add to and revise the Job Posting details.

The Job Posting template auto-populates most of the fields from the workflow sections.

Section 14 - Job Posting (continued)

JOB POSTING

Qualifications section of Job Posting details.

Qualifications:

Note to Hiring Manager: Use the following list of qualifications to create your REQUIRED and/or PREFERRED qualifications below.
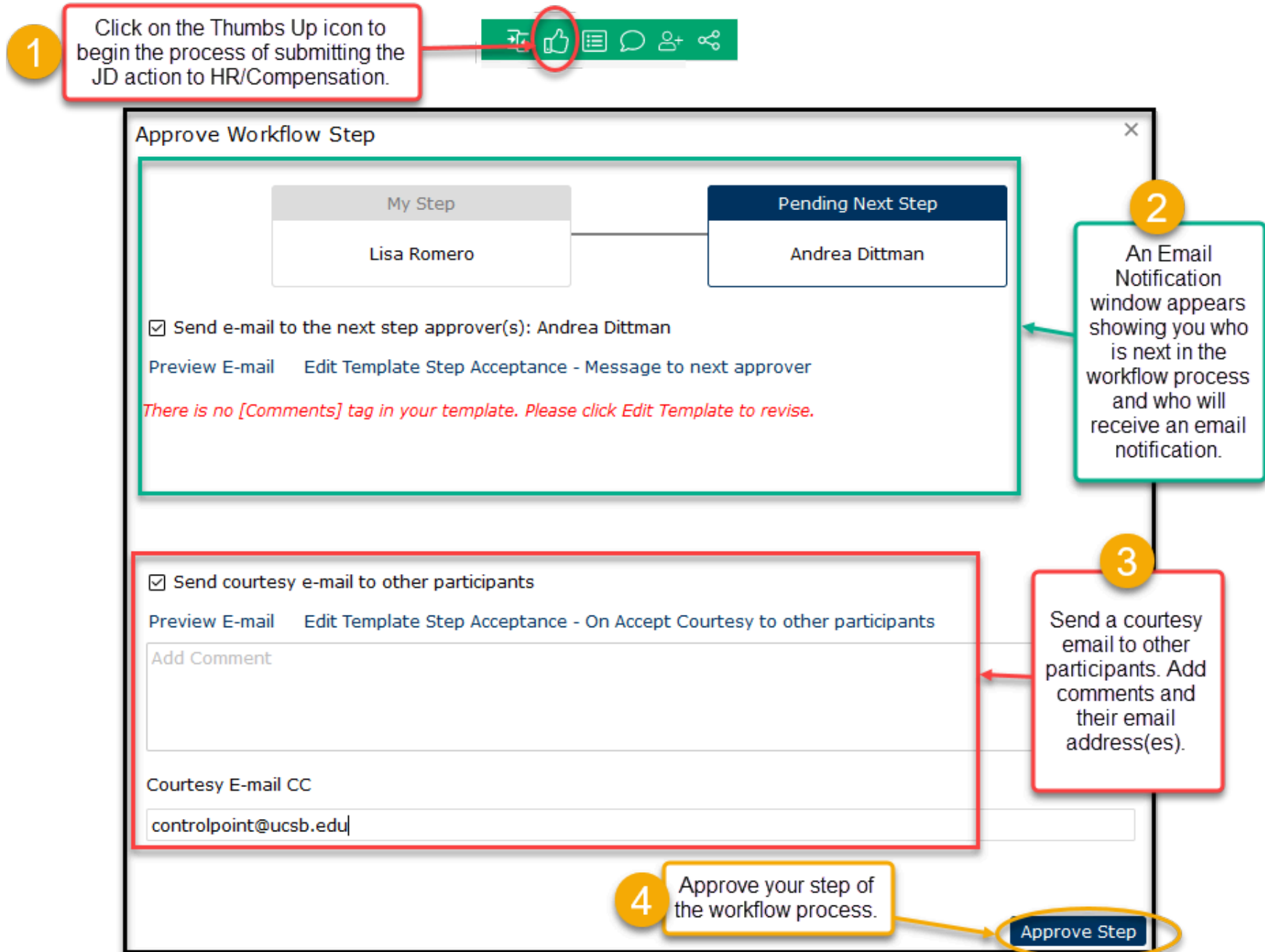
- Bachelor's degree in related area and / or equivalent experience / training
- 1-3 years Compensation Analysis Preferred or
- 1-3 years Human Resources field Preferred
- Demonstrates skills and experience as a seasoned professional with a comprehensive understanding of compensation concepts.
- Applies compensation policies, and procedures, as well as, knowledge of various federal and state labor laws and regulations, to resolve a variety of compensation-related issues of significant scope and complexity where analysis of situations and data requires a review of a variety of factors.
- Resolves complex issues in imaginative and practical ways where analysis of situations and data requires a review of a variety of factors.
- Develops and implements compensation programs for client groups as necessary and as requested.
- Understands how various initiatives may impact areas of human resources.
- Prioritizes competing work assignments and meets deadlines.
- Works well with data, including utilizing a variety of databases and query tools, exporting data t   arge sets of data using advanced Excel tools, creating data summaries, and designing data reports.
- Is highly effective at being productive, cooperative, and establishing mutually beneficial   coworkers, peers, and management.
- Exercises judgment within defined compensation procedures and practices to determine
- Demonstrates highly effective analytical skills to conduct analysis and develop recomm
- Certified Compensation Professional credential preferred.

The Qualifications section in the Job Posting will have to be manually rearranged and edited in TAM into **Required and Preferred Qualifications** for the job posting.
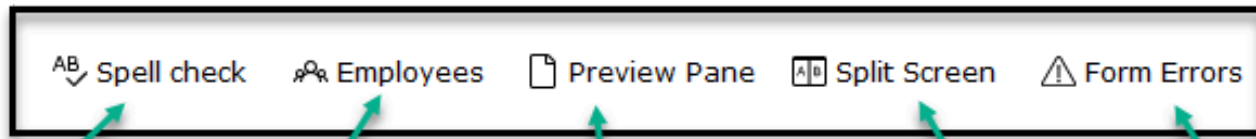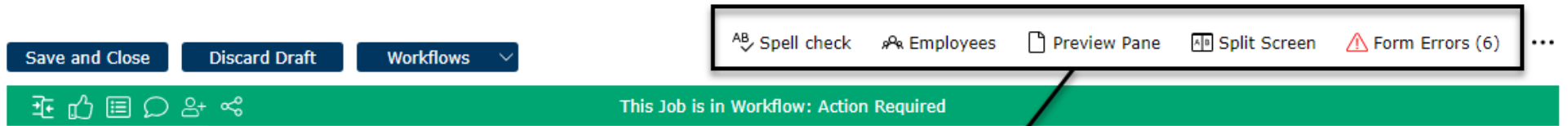
Required Qualifications:

Preferred Qualifications:

Finalize and Submit a Job Description to HR/Compensation

1 Click on the Thumbs Up icon to begin the process of submitting the JD action to HR/Compensation.

Approve Workflow Step ✕

My Step	Pending Next Step
Lisa Romero	Andrea Dittman

☑ Send e-mail to the next step approver(s): Andrea Dittman

Preview E-mail   Edit Template Step Acceptance - Message to next approver

There is no [Comments] tag in your template. Please click Edit Template to revise.

2 An Email Notification window appears showing you who is next in the workflow process and who will receive an email notification.

☑ Send courtesy e-mail to other participants

Preview E-mail   Edit Template Step Acceptance - On Accept Courtesy to other participants

Add Comment

Courtesy E-mail CC

controlpoint@ucsb.edu

3 Send a courtesy email to other participants. Add comments and their email address(es).

4 Approve your step of the workflow process.

Approve Step

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Workflow Screen Options

Save and Close	Discard Draft	Workflows ∨

This Job is in Workflow: Action Required

AB Spell check   Employees   Preview Pane   Split Screen   ⚠ Form Errors (6)   ...

AB Spell check   Employees   Preview Pane   Split Screen   ⚠ Form Errors
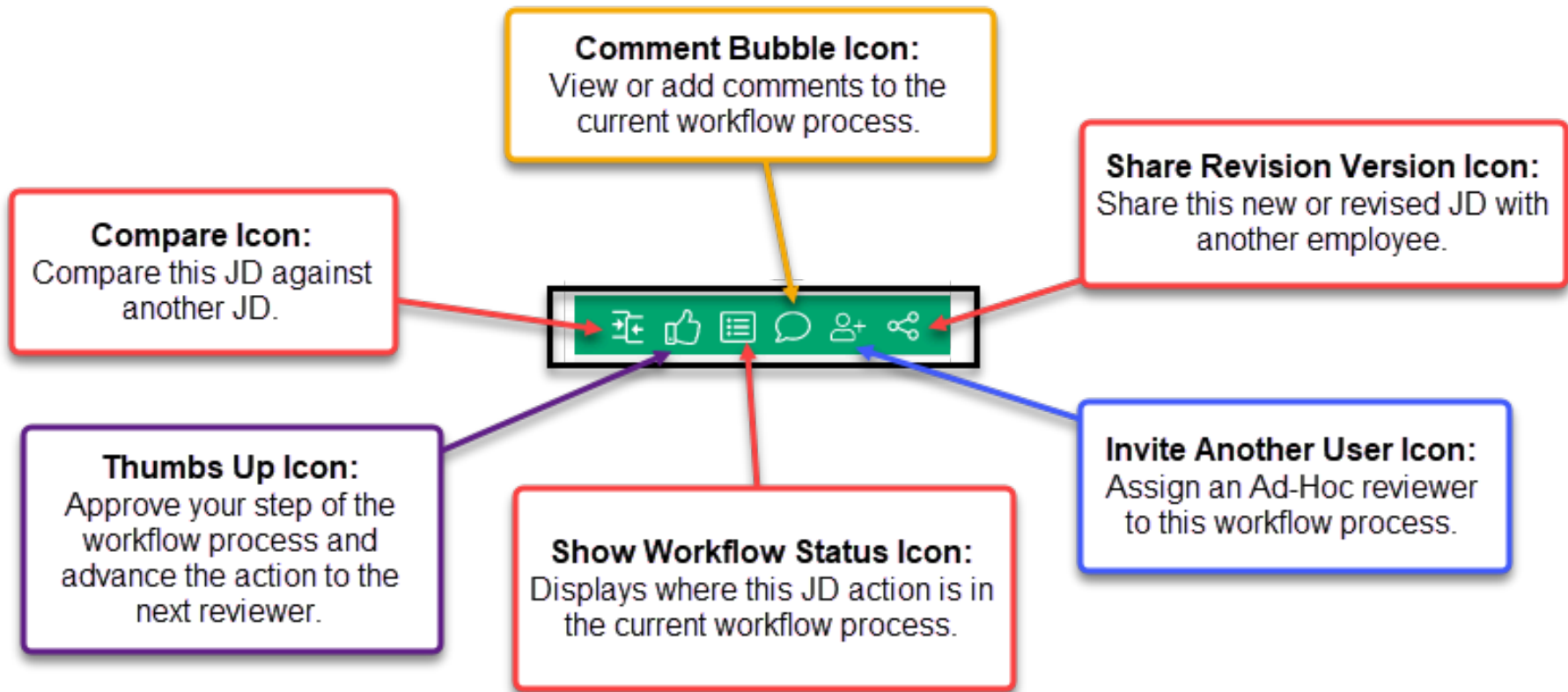
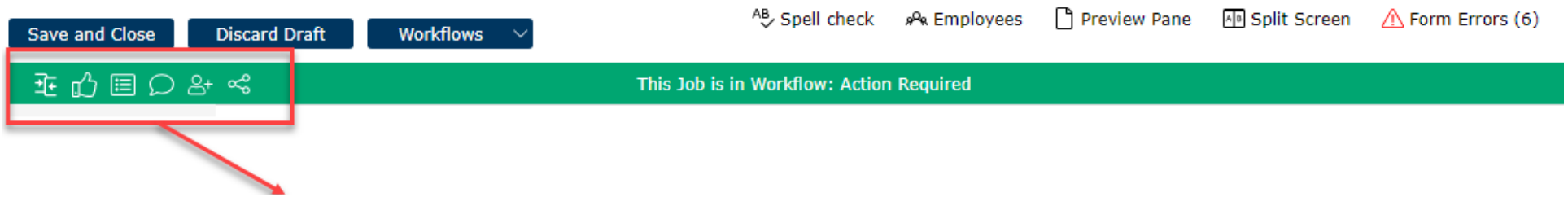Run a spell check of all the text boxes in workflow.

View the employee(s) linked to this JD.

Preview the PDF Print Version of the JD anytime during the workflow process. Click again to close the window.

Review the draft of the JD side-by-side with any CT Job Standard.

View a list of the required fields that need to be completed.

Green Workflow Tool Bar

Save and Close | **Discard Draft** | **Workflows** ⌄

AB Spell check   Employees   Preview Pane   Split Screen   ⚠ Form Errors (6)

This Job is in Workflow: Action Required

Comment Bubble Icon:
View or add comments to the current workflow process.

Share Revision Version Icon:
Share this new or revised JD with another employee.

Compare Icon:
Compare this JD against another JD.

Thumbs Up Icon:
Approve your step of the workflow process and advance the action to the next reviewer.

Show Workflow Status Icon:
Displays where this JD action is in the current workflow process.

Invite Another User Icon:
Assign an Ad-Hoc reviewer to this workflow process.

Archiving a Job Description

- Follow the instructions to [Revise a Job Description](#). On the Job Details section, select YES for the "Archive this Job Description" field.
- In the Action Justification section, indicate why you want to archive the job description.
- Click the thumbs-up button on the workflow toolbar to submit the job description to archives.
- If there are many required fields preventing you from archiving the JD, submit a ServiceNow ticket to Compensation to have them override the required fields and archive the JD for you.

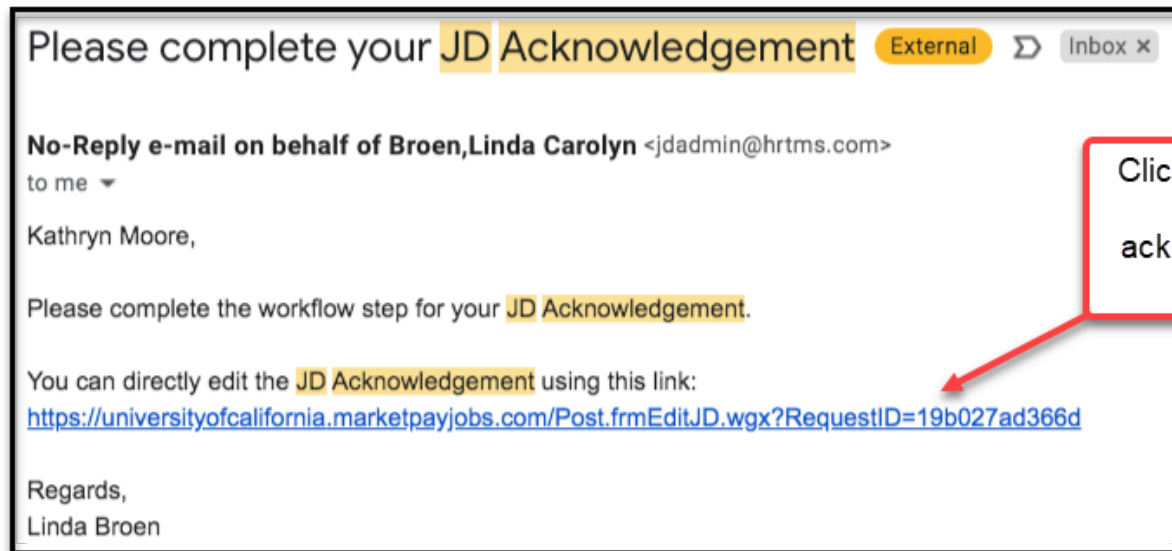# Job Description (JD) Acknowledgement Process

The **JD Acknowledgement** process is initiated when employees are newly hired, promoted to another position, reclassified, or have updates made to their job description.

The JD (Job Description) can be acknowledged in one of two ways.
1. The first is by clicking on the link in the email that was sent after you were hired; and
2. The second is by logging into Job Builder.

Acknowledgement via the Email Link:

1. An email is automatically sent to the employee linked to the job description (see sample email below). When you receive a JD Acknowledgement email, start the process by clicking on the link in the email:

2. Read the instructions and then review your job description.

3. View your job description before acknowledging it.

4. View, print and/or download your job description. Close the window when done.

8 Click "Close Form" when done viewing your JD.

5 Scroll down to view your job description.

6 Print a copy of your job description, if you desire.

7 Download a PDF or Word version of your job description, if you desire.

Compensation Manager 1 (40035711)

Close Form

Job Description:
Compensation Manager 1 (40035711)

Print Profile:
Default

Preview Job Description
⦿ PDF Format   ○ HTML Format

Refresh

Download/Share Job Description

1 of 10   — +   Automatic Zoom

UC SANTA BARBARA   COMPENSATION MGR 1 (000616)
                                        Job Description

Job History/Status
Approved Date: 11/12/2021 12:27:56 PM
Date Last Edited: 11/12/2021 12:26:45 PM
Last Action Approved: New JD
Last Action Effective Date: 11/8/2021

Organization Details
Business Unit (Location):   SBCMP
Department Name: PERS HUMAN RESOURCES
Division Name: Admin Services

The Department of Human Resources is dedicated to providing exemplary customer service in support of teaching, research and the public service mission of UCSB. We are committed to forming strategic partnerships within the UCSB community that create a work environment designed to attract, develop and

5. Check the acknowledgement box and click on "Complete Workflow Step":

Employee Acknowledgement

Associate name: Kathryn Moore
Manager Name: Lisa Romero
Job Description Title: Compensation Manager 1
Jobcode: 40035711

Check the box and then click on "Complete Workflow Step".

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View Job Description 'Compensation Manager 1 (40035711)'

Job Description Acknowledgement:
☑ I acknowledge that I have received and reviewed my job description.

Compensation Manager 1 (40035711) was acknowledged by Kathryn Moore on 11/20/2021

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Complete Workflow Step

6. Finalize the acknowledgement process by checking the box and clicking "Confirm".

Check the box and click "Confirm" to complete the JD acknowledgment process.

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My Sign-Off

☑ By checking this box, I confirm that I have received and reviewed my job description. If I have any questions or concerns I will contact my immediate supervisor.

✓ Confirm

7. You no longer need to print out and sign your job description. The online acknowledgement process replaces the old process of wet-signing JDs.

Acknowledgement via Logging into Job Builder:

1. An employee can log into Job Builder to acknowledge receipt of their job description. Follow the instructions for .

2. On the Home Page, double click on the Acknowledgement link.
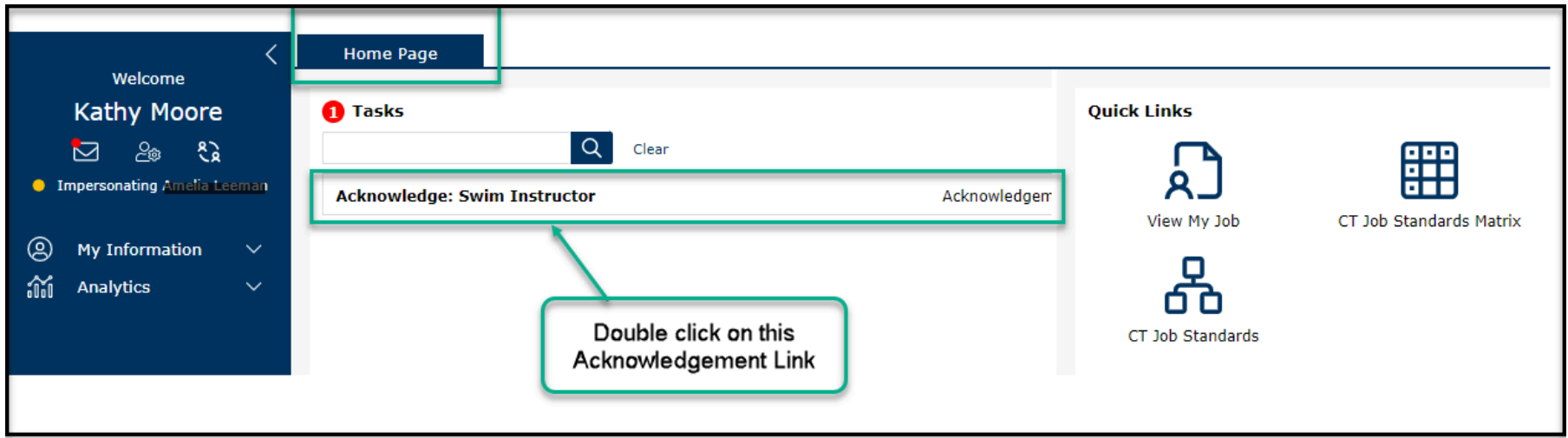
3. Scroll through the job description to review it and then click on Accept to acknowledge receipt of the JD.

Job Acknowledgment   ✕

Not yet acknowledged

Employee Name   Amelia Leeman

Manager Name   Richard Van Hoorn

Department   RECR

Cycle   2024 New Job Description Acknowledgme

> Use the scroll bar to view the entire job description.

UC SANTA BARBARA

RECR PRG LEADER 2 BYA (004133)
Job Description

View tool tips for additional information on filling out the Job Details section. A downloadable Job Description template is available on the HR website at https://www.hr.ucsb.edu/hr-units/compensation/oacis

Job History/Status

Approved Date:	6/20/2024 1:53:25 PM
Date Last Edited:	6/20/2024 1:53:23 PM
Last Action Approved:	Position Mgmt Update
Last Action Effective Date:	6/14/2024

Organization Details

Business Unit (Location):	SBCMP
Department Code	RECR
Department Name:	RECR (PHYSICAL ACTIVITIES&RECREATION)
Division Name:	Student Affairs
Department Profile (Specific Information about Department/Program):	The UCSB Department of Recreation provides programs, services, and facilities for students, staff, faculty, and community members which promote an active, balanced lifestyle that contributes to the development of social, emotional, and physical health essential to long-term wellbeing.

Position Details

Position ID:	41099731

> Click on Accept to acknowledge receipt of your job description.

[Accept]   Close

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