

# Job Builder User Guide - Submitter/Preparer

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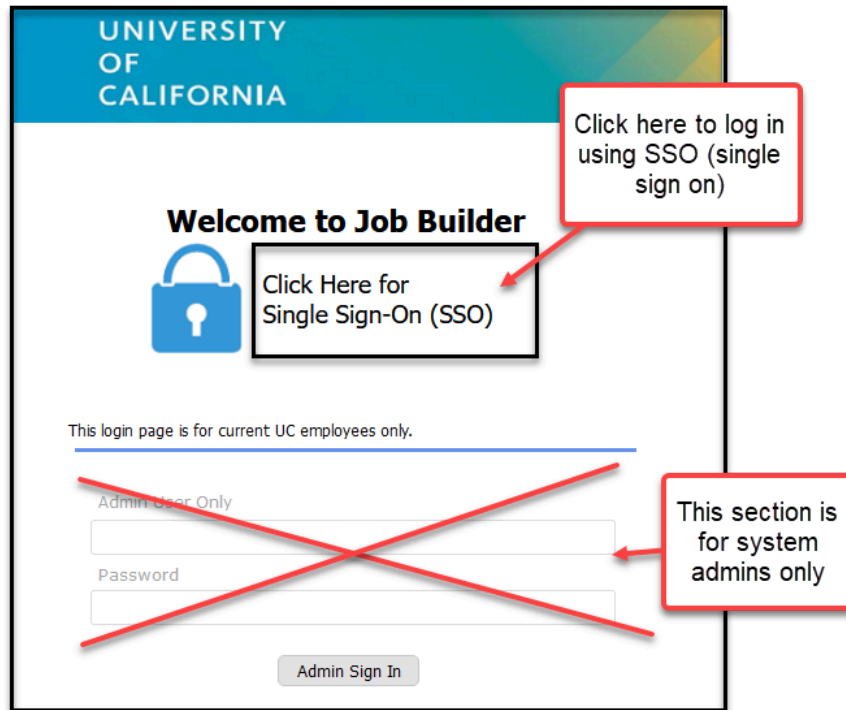
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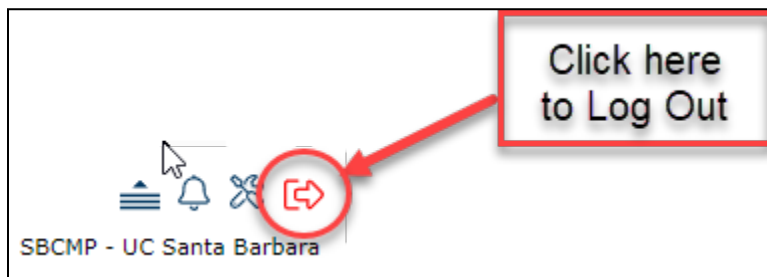
# Log In / Log Out

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

1. Log In to Job Builder:



2. Log Out of Job Builder:

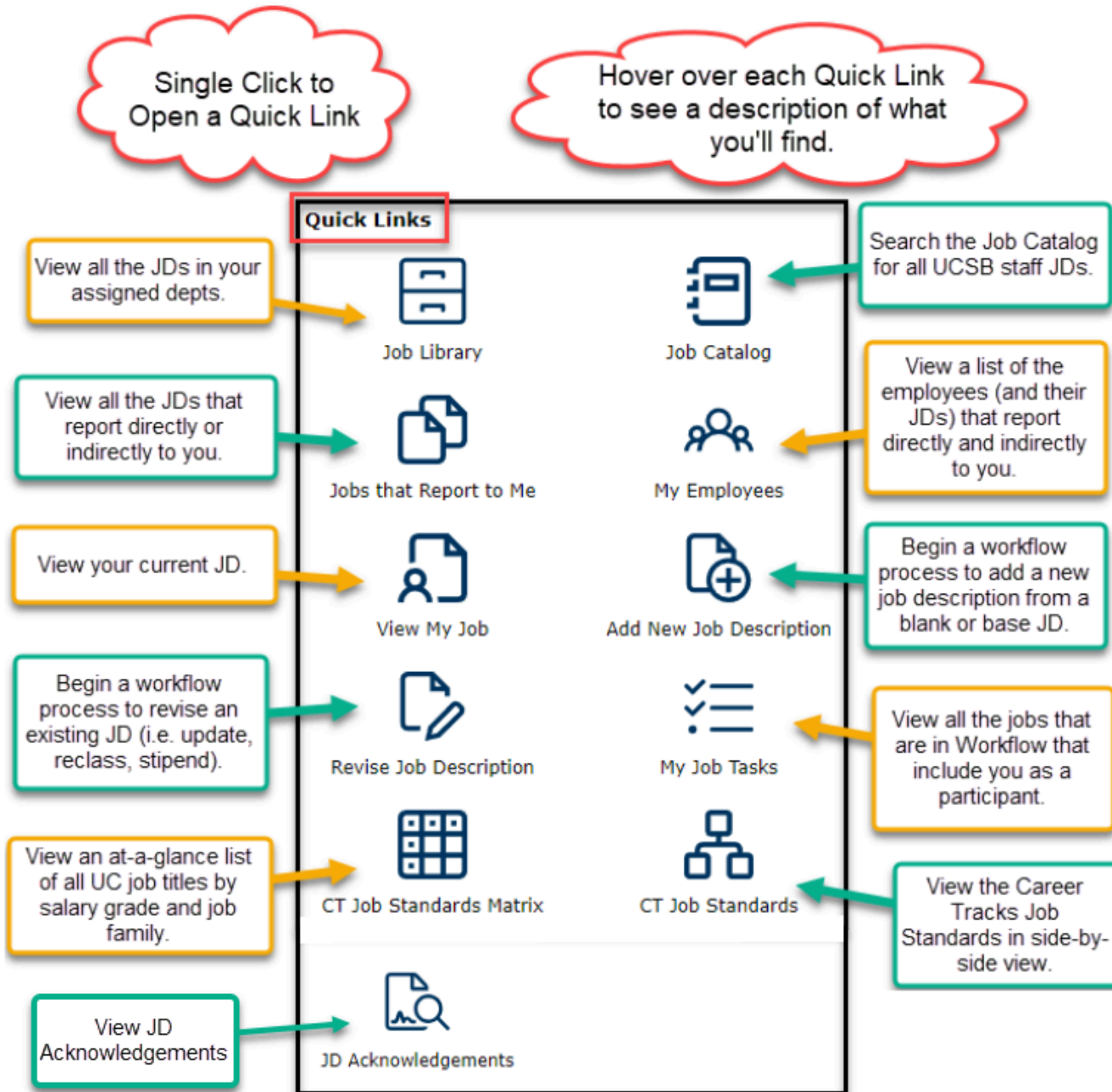


# Home Page Navigation

The screenshot shows the 'Job Description System' interface. At the top right, it says 'Logged on as Kathy Moore; Imp'. The main header area includes a 'Home Page' tab and a 'Welcome Kathy Moore' section with icons for mail, settings, and a profile picture. A dark blue navigation sidebar on the left is highlighted with a red border and contains the following menu items: Search (with sub-items Job Library and Job Catalog), My Information (with sub-items Jobs that Report to Me, My Employees, and View My Job), Actions (with sub-items Add New Job Description, Revise Job Description, and My Job Tasks), Analytics (with sub-items CT Job Standards Matrix and CT Job Standards), and another Search section (with sub-item JD Acknowledgements). The main content area features a 'Tasks' section with a search bar and two rows of tasks: 'Please Review: TEST Job 2 for training' and 'Please Review: TEST Job 3 for training', both categorized as 'Job Description Review'. A red callout bubble points to the 'Actions' menu item, stating: 'Blue navigation bar menu items contain the same information as the Quick Links.' A green callout bubble points to the task rows, stating: 'View any jobs that you have in Workflow by double-clicking on the row.'

# Quick Links

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



# View My Job

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

**Job Description:**  
Administrative Manager 1 (40035501)

**Print Profile:**  
Default

**Preview Job Description**  
 PDF Format  HTML Format

**Download/Share Job Description**  
Word PDF HTML Share

**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.

The screenshot shows the 'Jobs that Report to Me' page. At the top, there are navigation tabs for 'Home Page' and 'Jobs that Report to Me'. Below the tabs is a search bar with a text input field and a dropdown menu currently set to 'All My Jobs'. To the right of the search bar are two buttons: 'Org Chart' and 'Export'. Below the search bar is a 'Side-By-Side' button and a table of job descriptions. The table has columns for Action, Action Requested, Department Name, Position ID, System Title, UC Job Code, UC Payroll Title, Working Title, and a partially visible 'Cl' column. The first row shows 'HR Admin Update' for 'PERS (HUMAN RESOURCES)' with Position ID 40034410 and System Title 'Benefits Analyst 3 (40034410)'. The second row shows 'HR Admin Update' for 'PERS (HUMAN RESOURCES)' with Position ID 40035047 and System Title 'Benefits Analyst 3 (40035047)'. The third row shows 'HR Admin Update' for 'PERS (HUMAN RESOURCES)' with Position ID 40077113 and System Title 'Benefits Analyst 3 (40077113)'. The fourth row shows 'HR Admin Update' for 'PERS (HUMAN RESOURCES)' with Position ID 40832202 and System Title 'Benefits Analyst 3 (40832202)'. The fifth row shows 'Update (no title change)' for 'PERS (HUMAN RESOURCES)' with Position ID 40036352 and System Title 'Benefits Analyst 4 (40036352)'. The 'Working Title' column contains 'Health Care Facilitator', 'Work-Life Resource Coordinator', 'Workplace Accommodation Specialist', 'Workplace Accommodations Specialist', and 'Sr. Workplace Accommodations Specialist'. Callouts include: 'Narrow your search using the open text search.' pointing to the search input; 'Narrow your search using the smart search drop-down filters.' pointing to the 'All My Jobs' dropdown; 'View and org chart of all the jobs that report to you.' pointing to the 'Org Chart' button; 'Export an Excel version of the grid.' pointing to the 'Export' button; 'Single click on any row then click here to view all details about this JD in Form View.' pointing to the first row's action icon; 'Single click on any row then click here to view the employee(s) linked to this JD.' pointing to the second row's action icon; 'Single click on any row then click here to mark JD as a favorite.' pointing to the fourth row's heart icon; 'Scroll down to see more rows.' pointing to the vertical scrollbar; and 'Scroll across to see more columns.' pointing to the horizontal scrollbar.

# My Employees

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

The screenshot shows the 'My Employees' page with several callouts:

- Narrow your search using the open text search.** (points to the search bar)
- Narrow your search using the smart search drop-down filters.** (points to the Filter dropdown)
- View and org chart of all the jobs that report to you.** (points to the Org Chart button)
- Export an Excel version of the grid.** (points to the Export button)
- Click OFF to see all direct AND indirect reports.** (points to the Direct Reports Only toggle switch)
- Single click on any row then click here to view details about this employee.** (points to the magnifying glass icon in the Action column)
- Single click on any row then click here to view the employee(s) JD in Form View.** (points to the document icon in the Action column)
- Single click on any row then click here to share this JD with the employee.** (points to the share icon in the Action column)
- Scroll right to see more columns.** (points to the horizontal scrollbar)

The interface includes a navigation bar with 'Home Page', 'Jobs that Report to Me', and 'My Employees'. Below the navigation bar is a search bar with a 'Filter' dropdown and a 'Direct Reports Only' toggle switch. The main content area features a table with columns: Action, Department, Emplid, Position ID, Employee Name, UC Job Cod, and UC Payroll Title. A 'Tree View' panel is visible on the right side of the table.

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



# Job Library - Part 1

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

The screenshot shows the Job Library interface with several callouts:

- Narrow your search using the open text search.** (points to the search bar)
- Narrow your search using the smart search drop-down filters.** (points to the Filter dropdown)
- Click OFF to see all active and inactive jobs (i.e. filled vs. vacant).** (points to the Show Active Jobs Only toggle)
- Export an Excel version of the grid.** (points to the Export button)
- Double click on a row to open up the Form View of the JD.** (points to a row in the table)
- Scroll down to see more rows.** (points to the scroll bar)
- Single click on any row then click here to mark the JD as a favorite.** (points to the heart icon in the first column)
- Scroll right to see more columns.** (points to the horizontal scroll bar)
- See next page for an explanation.** (points to the right arrow icon)

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 Resources Department. Using a	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

# Job Library - Part 2

Job Library

Filter  Advanced  Show Active Jobs Only

Export Archives

Viewed Department Name - PERS HUMAN

158 Records Max Records 300

Department Name	Position ID	System Title	UC Job Code	UC Payroll Title	Working/Business
PERS HUMAN RESOURCES	40074435	Benefits Analyst 2 (40074435) The Leave Coordinator manages, plans and administers the leave	007719	BENEFITS ANL 2 (007719)	Leave Program Coordinator

Click on the carrot to open another menu

Preview  
Employees

Preview the JD for the row you highlighted.

Action	ID	Department Name	Position ID	System Title
♥	41819	PERS HUMAN RESOURCES	40074139	The Workforce Specialist provides administrative support to the HR department. Responsible for the campus
♥	43034	PERS HUMAN RESOURCES	40074435	The Leave Coordinator manages, plans and administers the leave processes for the campus in the ongoing centralized leave program
♥	43035	PERS HUMAN RESOURCES	40077113	The Transition Workforce Program (TWP) Coordinator is responsible for the campus work/transition program for employees

Preview

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

Preview  
Employees

System Title

Administrative Officer 2 (40074139)

The Workforce Administrator provides administrative support to the HR department. Responsible for the campus

Benefits Analyst 2 (40074435)

The Leave Coordinator manages, plans and administers the leave

Employees

Filter

Assign To Employees Assign to Another Job

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

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

Preview  
Employees

# 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

The screenshot shows the Job Catalog interface with several callouts:

- Search by Position ID in the open search text box:** Points to the search input field.
- Narrow your search using pre-defined search filters:** Points to the dropdown menus for Department, Payroll Title, and System Title.
- Click on the carrot to view the Job Posting details for the highlighted row:** Points to the left-pointing arrow icon in the top right corner of the table.
- Double click on a row to view a PDF version of the JD:** Points to the highlighted row for the Administrative Manager 1 position.

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	<b>Administrative Manager 1 (40035501)</b> 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	<b>Administrative Manager 1 (40035516)</b> Under the general direction of	ADMIN MGR 1	Director, HSSB Administrative	99 - Non-

# 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.

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

The screenshot displays the 'My Job Tasks' section of a web application. At the top, there are navigation tabs for 'Home Page' and 'My Job Tasks'. Below the tabs is a search bar with a search icon and a dropdown menu set to 'In Progress Workflows'. A table lists job actions with columns for Action, Action Request, Department Name, UC Payroll Title, Working/Business Title, and Position ID. Two rows are visible: one for 'TEST Job 6 for training' and another for 'TEST Job 5 for training'. A callout box highlights the 'My Step: Action Required' status for the first row, showing the user 'Lisa Romero' and the assignee 'Linda B'. Another callout box highlights the 'Step Approved' status for the second row, showing the user 'Lisa Romero' and the assignee 'Kathr'. A third callout box highlights the 'Compare Revision' icon in the first row. A fourth callout box highlights the 'Edit' icon in the first row. A fifth callout box highlights the 'My Job Tasks' tab.

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 Kathr

# CT Job Standards Matrix

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

The screenshot shows the 'CT Job Standards Matrix' interface. At the top, there are navigation tabs for 'Home Page' and 'CT Job Standards Matrix'. Below this is a search bar with a 'Filter' dropdown, a search icon, and a 'Show Active Jobs Only' toggle. A vertical list of job families is on the left, with 'Human Resources' highlighted. The main area displays a table of job standards for 'Academic Human Resources' and 'Benefits'. A horizontal scroll bar is visible above the table, with callouts explaining how to use the carots to view different job families. A specific job title, 'ACAD HR MGR 3 (000596)', is highlighted with a callout explaining that double-clicking opens a print version of the job standard.

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.

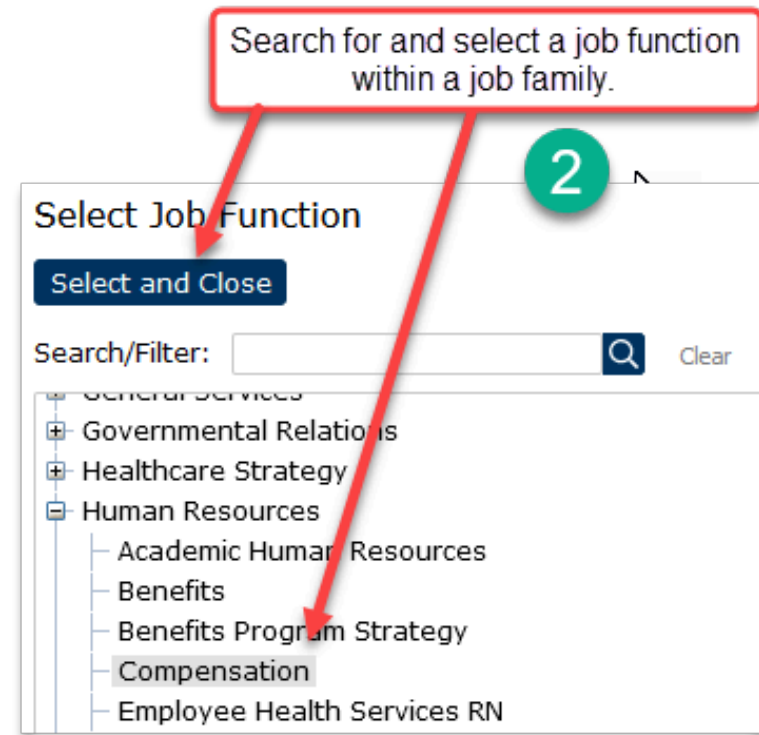
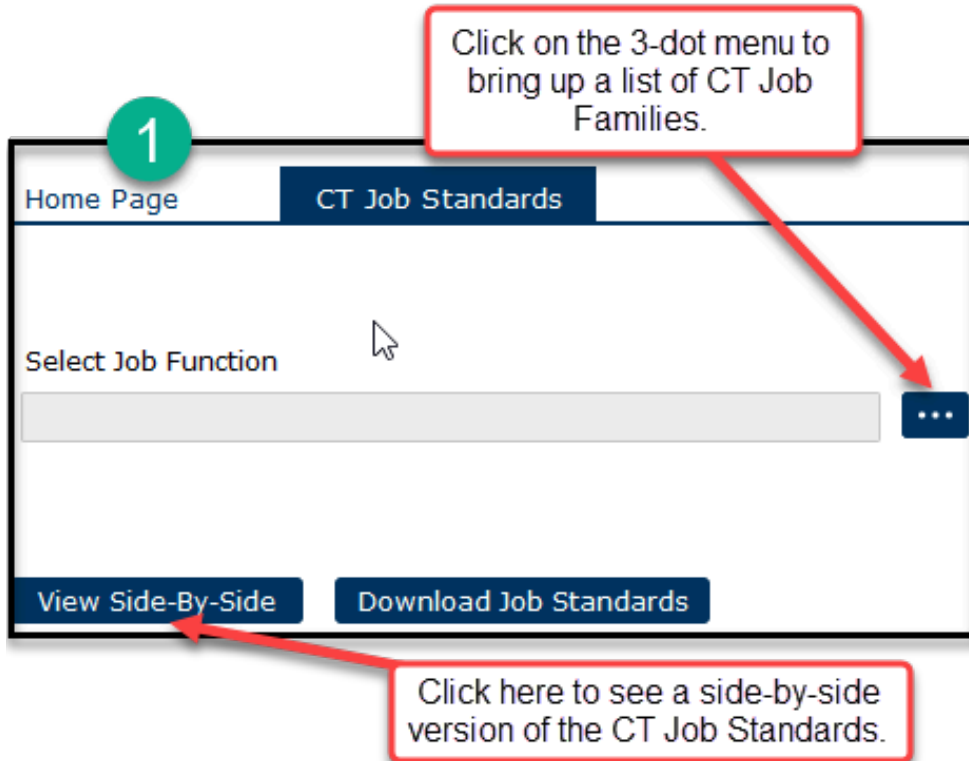
Hover over the carots to view the Job Families as they scroll left and right.

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

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.



# CT Job Standards (continued)

**Side-By-Side View** 3

Reset   **Export as Excel**   Edit Profiles

Selected Jobs: 11 Jobs Selected   **Export this grid to Excel.** ▾

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 <span style="float: right;">×</span>	Compensation Analyst 2 <span style="float: right;">×</span>
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.

The screenshot shows a web form for creating a new job description. It includes fields for Position ID, New Job Title, Unique Job Name, Job Standard, Select Workflow, Department Initiates Action, and HR/Comp Reviews. A 'Start Workflow' button is at the bottom right. Five numbered callouts provide instructions:

- 1:** Choose a Template. Callout: Click on Blank Job to use a CT Job Standard to pre-fill your JD.
- 2:** Enter in a Working/Business title. Callout: Enter in a Working/Business title.
- 3:** Select a template CT job standard to populate the new JD. See next few pages for instructions. Callout: Select a template CT job standard to populate the new JD. See next few pages for instructions.
- 4:** Click here to assign an HR/Comp Reviewer. See next few pages for instructions. Callout: Click here to assign an HR/Comp Reviewer. See next few pages for instructions.
- 5:** Click here to officially start the Workflow process. Callout: Click here to officially start the Workflow process.



## Add a New Job Description - Blank Job (continued)

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

The screenshot shows a two-step process for selecting a job standard template. Step 3 (top) involves clicking a 3-dot menu to open a list of CT job standard templates. Step 1 (middle) involves typing a job title or code into a search bar, or using a smart filter. Step 2 (bottom right) involves clicking a row in a table to highlight it. Step 3 (bottom left) involves clicking the 'Save Job Standard' button.

**3** Select Parent for the new Job Description

Save and Close

Job Standard

Parent/Child Settings File  
UCSB Master Template

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

**1** Select Job Standard for 'TEST Job

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

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

Search  
compensation | X Filter [Q] Advanced [ ] Same Job Family Only

Selected Job (TBD\_202) Job Family

Job Code TBD\_202 Job Function

Job

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

Save Job Standard Side-By-Side

**2** Click once to highlight the row you want.

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

## Add a New Job Description - **Blank Job** (continued)

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

**4**

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


**5**

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](#)

## 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

or

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

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

2

Search Content Library

Search Jobs for

X All Job Families and Job Functions

Search in Results

X  No Jobs to Display

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

## Add a New Job Description - Base Job (continued)

The screenshot shows a web application interface for searching jobs. At the top, there is a search bar with the text "financial services analyst 2" and a dropdown menu set to "All Job Families and Job Functions". A red callout box with the number "3" points to the search bar, stating: "By typing in a payroll title, the system presented search results based on the closest matches to this title." Below the search bar, there are several job titles listed in a horizontal scrollable area: "Financial Work-Study Analyst", "Financial Analyst", "TEST Training Job Financial Analyst", "Special Projects-Senior Financial Analyst", and "Financial Services Analyst 3".

Below this is a "Search in Results" section with a "Filter" dropdown and "50 Jobs Displayed". A list of job titles is shown, with the first one, "Financial Work-Study Analyst", highlighted in blue. A red callout box points to the "Company Jobs" column next to the highlighted job, stating: "'Company Jobs' is another name for UCSB jobs." A green callout box points to the right side of the highlighted job, stating: "The General Summary for the UCSB job highlighted is displayed here." Below this, a detailed summary is visible: "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..."

At the bottom right, there is a "Save and Close" button. A red callout box points to it, stating: "Click here once you've made your selection." A yellow callout box points to the bottom of the job list, stating: "Scroll down to see all jobs listed." A green callout box points to the "Financial Work-Study Analyst" title in the list, stating: "Hover over a title to see the Position ID and General Summary."

## 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.

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

Lisa Romero

HR/Comp Reviews

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

5

Job Revision Workflow(s)

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.

The screenshot shows a web interface for managing job descriptions. At the top, a 'Selected Job(s)' section contains a table with columns: Action, Job ID, Job Code, Job Name, and Version. An 'Add Job' button is located to the right of this table, circled with a red circle and labeled '1'. Below this is a search window with a search bar containing 'TEST job', a 'Filter' dropdown, and a search icon. A callout box labeled '2' points to the search bar with the text: 'Search for the JD you wish to revise using the text box or smart filters.' Below the search bar is a table of job descriptions with columns: ID, Position ID, UC Payroll Title, Working/Business Title, Department, Num EEs, Version, and Current Reviewer. The third row is highlighted in grey, and a callout box labeled '3' points to it with the text: 'Click once to highlight the JD you wish to revise.' Below the table is a 'Selected Jobs (1)' section showing 'Administrative Officer 3' with a red 'x' icon. A callout box labeled '4' points to this section with the text: 'Make sure you've only selected one JD.' At the bottom right, a 'Select and Close' button is circled with a red circle and labeled '5' with the text: 'Click here to continue.' A callout box labeled '1' also points to the search window with the text: 'Click here to bring up a search window of all the JDs in your assigned'.

Action	Job ID	Job Code	Job Name	Version

Search: TEST job [X] Filter [Q] Advanced

Uncheck All

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



Selected Jobs (1)

Administrative Officer 3 [X]

Select and Close



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

Selected Job(s)

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



**Add Job**

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.)

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

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.

Save and Close Discard Draft Workflows Spell check Employees Preview Pane Split Screen Form Errors (47)

This Job is in Workflow: Action Required

TEST Job 3 for Training  Edit

Click the Edit button to begin editing this JD.

Scroll down to complete all parts of the section.

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:

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

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



## Section 1 - Job Details (continued)

### Position Details

Position ID:	TBD_162
 Proposed Position ID:	<input type="text"/>
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:	<input type="text"/>
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.

## Section 1 - Job Details (continued)

Eligible for Remote Work?

Type of Remote Work Arrangement:

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

View Side-by-Side:

[Show Side-by-Side View](#)

[Click here to view the Side-by-Side comparison of jobs this Job Family](#)

Previous  [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.**

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

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

## Section 2 - Supervision

Click or hover over the help bubbles for more information.

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

**2** Select the level of supervision received.

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

**4** Enter other non-career positions supervised.

**5** SAVE your work before continuing on.

Previous Next Save

**SUPERVISION**

Name of Supervisor: Kathy Moore

Supervisor's Payroll Title: Compensation Manager 1

Name of Department Head: Vacant (TBD)

**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

**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

**Other Positions Supervised (limiteds, contracts, and students)**

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

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

## Section 3 - Job Summary

**JOB SUMMARY**

*General Summary of Job Duties and Responsibilities*

**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 of Public Affairs and Communications ("OPAC"). Primary responsibilities focus on Supplies & Expense 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 expense reports and summaries. Serves as the back-up to the Associate Business Manager 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

*CT Job Function Summary*

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

*CT Generic Scope Description*

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

*CT Custom Scope Description*

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

Previous Next **Save**

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

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

3 SAVE your work before continuing on.

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

# Section 4 - Essential Functions and Duties

**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.

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.

1 Manually add/revise functions and duties.

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

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

**Essential Functions and Duties** Total Percentage: 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
1	Financial Analysis & Reporting	TEST TEST TEST
2	Business Operations Support	TEST TEST TEST

[Add New Row](#) [Manage Rows](#)

**Non-Essential Duties**

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 responsibilities subject to review and change at any time, with or without notice, in accordance with the University of California, Santa Barbara's policies and standards.
- 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 seek to achieve.

**5** SAVE your work before continuing on.

Previous Next **Save**

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

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

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

## Section 5 - Qualifications

**1** 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
Bachelor's degree in related area and / or equivalent experience / training.	Required

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

**2** Education Requirements for this Position

Add Delete Row Move Up Move Down Paste List Export

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	

Manually add/revise education requirements.

Cut and paste from the reference section if applicable.

**2** Work Experience

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

List the Experience Requirements for this position.

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

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

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

KSAs

- Working knowledge of financial processes, policies and procedures.
- Strong knowledge of financial data management and reporting systems.

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

**3** 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.

KSAs

- Strong organizational skills and unflinching attention to detail and accuracy.

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

Click on Content Search to view KSAs related this JD.

## 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	<input type="checkbox"/>

[Add New Row](#) [Manage Rows](#)

**For Reference Only - Legacy KSAs and Other Qualifications**

- Bachelor's degree or equivalent combination of education and experience. - Strong oral and written communication skills and accuracy. - Exceptional verbal and interpersonal skills that foster positive relationships. - Proficiency in Microsoft Word, Excel, PowerPoint, Internet and e-mail and demonstrate the ability to manage multiple programs and application portals. - Ability to work independently. - Ability to maintain strong working relationships with internal and external stakeholders. - Ability to prioritize duties and achieve planned goals for a large and busy unit. - Ability to work under pressure. - Ability to effectively solve problems and demonstrate sound reasoning and judgment. - Ability to establish and maintain collaborative 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](#)

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

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

## Section 6 - Competencies

**COMPETENCIES**

**UC Core Competencies**  
The core competencies below apply to all UC staff employees, regardless of location, level, or position. They are essential to 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 to 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 identifying skillsets needed to perform successfully on the job. Consistently works to learn and open to feedback.

1 Click here to open the Functional Competency chart.

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

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

**Functional Competencies**

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

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

3 SAVE your work before continuing on.

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?	5
Functional Knowledge	1. Entry	How do you gain the knowledge to do your job?	5

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

Save and Close

Competency Name

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 techniques to determine the best approach.
Business Impact	Role has impact on the department.	Responsible for the team and objectives.
Collaboration	Develops partnerships with internal team members.	Creates internal alliances outside immediate team or department.

Previous Next Save



## 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 person must understand the nature of the problem. Additionally reflects typical timeframes associated with resolving problems.

- Provides resolution to problems that are readily identifiable with limited scope and complexity in accordance with standard practices, procedures, applications or routines. Problem 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, recommendations or actions by the incumbent.

- Failure to accomplish results can normally be overcome without significant effect on the organization.

### 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)

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

### Financial Responsibilities

#### Financial Controls

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

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

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
<input type="checkbox"/> Total Permanent Operating Budget			
<input checked="" type="checkbox"/> Total Annual Expenditures	Department	\$1,500,000	test
<input type="checkbox"/> Recharge and Income Revenue			
<input type="checkbox"/> Gifts and Endowment Income			
<input type="checkbox"/> Contract and Grant Funds Awarded			
<input checked="" type="checkbox"/> Special Program Funding	Program	\$150,000	test
<input type="checkbox"/> Faculty Start-Up Funding			
<input type="checkbox"/> Other (please explain)			

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

## 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)
<input checked="" type="checkbox"/> Proposals Prepared and Submitted	6	\$17,500,000	test test test
<input checked="" type="checkbox"/> 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 responsibilities 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 Americans with Disabilities Act 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

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	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Walking	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Sitting	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

#### Other Physical Requirements

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

test test test

#### Environmental Requirements

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	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Chemicals or toxic substances	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
Combative patients	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

## 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

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.

Indicate the Mental Requirements for the position.

Exposures	Never 0 Hours	Occasional Up to 3 Hours	Frequent 3 to 6 Hours	Continuous 6 to 8+ Hours	Is Essential
Oral communication	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Perform calculations	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Read/Comprehend	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

**6 Travel Requirements**

Estimated Amount

5% test test test

Brief Description

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

SAVE your work before continuing on.

Previous Next Save

## 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](http://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](http://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 none of the above applies, click 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

### 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: CANRA 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   
Submitters Phone   
Compensation Reviewer Assigned

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

Is this action being performed for the purpose of recruitment?   
Is this a Temporary Stipend Action? If Yes, skip the remainder of this section.

This helps HR prioritize the action.

**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?

2

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

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.

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

**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.



## Section 10 - Action Justification (continued)

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

3

① **FOR ALL ACTIONS:** If duties have been removed or redelegated, please explain.  
test test test

**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

① **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

4

### Approvals

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

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

Control Point 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.

5

### Attachments

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.

Document Name:

[Upload...](#) [Download...](#) [Delete Document](#) [Refresh](#)

SAVE your work before continuing on.

[Previous](#) [Next](#) [Save](#)

# 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.

Clear Temp Assignment/Stipend Page

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

## 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	<input type="text"/>	...
End Date of Temp Assignment	<input type="text"/>	...
Revised End Date of Temp Assignment	<input type="text"/>	...

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.

2  
Complete all the questions on the Temporary Assignment section.

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.

## 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.

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.

3

Complete all the questions on the Temporary Assignment section so that HR/Compensation can properly assess eligibility for a 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	<input type="text" value="\$28.50"/>	
Effective Date of Current Salary/Pay Rate	<input type="text" value="7/1/2023"/>	<input type="button" value="..."/>
Proposed reclass percentage increase (i.e. 5, 10, 15)	<input type="text" value="10"/>	
Proposed New Salary/Pay Rate (reclasses only)	<input type="text" value="\$31.35"/>	
Proposed New Step/Grade (reclasses only)	<input type="text" value="19"/>	
Proposed stipend amount (enter a pro-rated monthly or biweekly amount)	<input type="text" value="\$0.00"/>	
Proposed stipend percentage (i.e. 5, 10, 15)	<input type="text"/>	
Have you considered the impact of the above salary increase on other employees in your department?	<input type="text" value="Yes"/>	<input type="button" value="v"/>
Fund Source Information	<input type="text" value="19900"/>	

1

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

HR Approved percentage increase	<input type="text" value="10"/>
? HR Approved new salary (reclasses only)	<input type="text" value="\$31.35"/>
? HR Approved Stipend Amount	<input type="text" value="\$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
---	----------------

## 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**

## 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.*

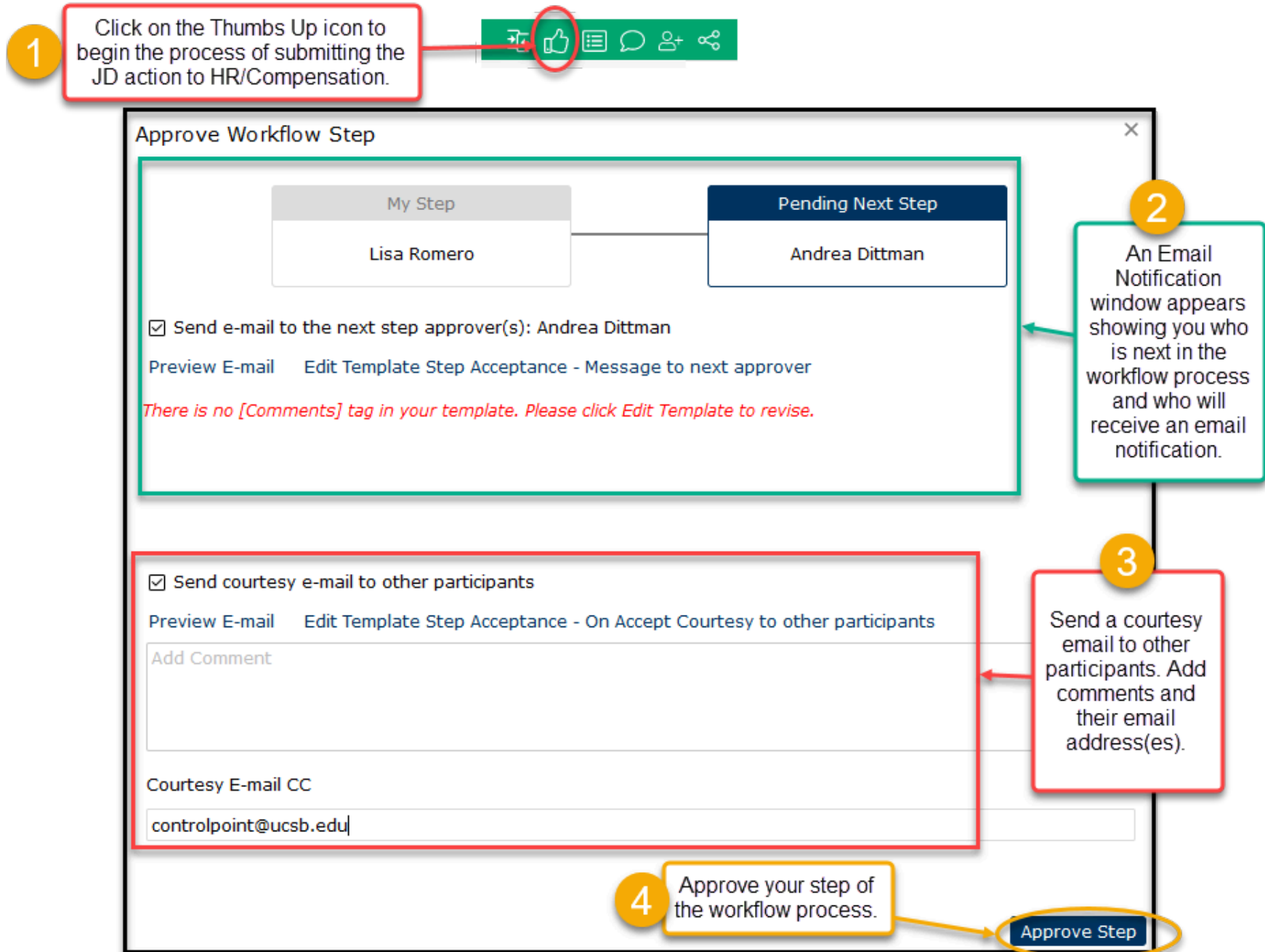
- Bachelor's degree in related area and / or equivalent experience / training
- 1-3 years Compensation Analysis Preferred or
- 1-3 years Human Resources field Preferred
- Demonstrates skills and experience as a seasoned professional with a comprehensive understanding of compensation concepts.
- Applies 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 to various systems, and analyzing large 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 relationships with coworkers, peers, and management.
- Exercises judgment within defined compensation procedures and practices to determine appropriate compensation levels.
- Demonstrates highly effective analytical skills to conduct analysis and develop recommendations.
- 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:**

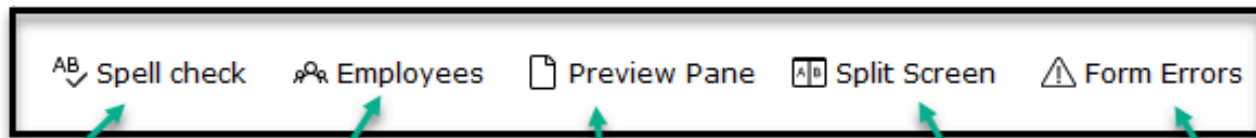
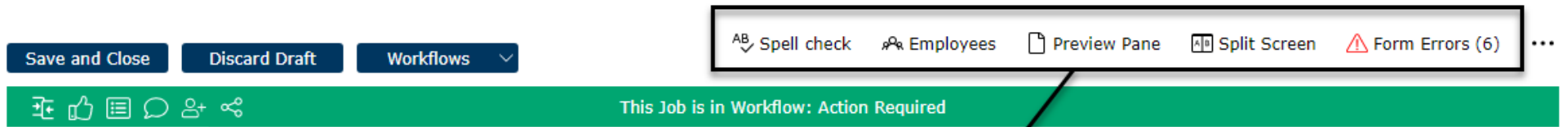
**Preferred Qualifications:**

# Finalize and Submit a Job Description to HR/Compensation





# Workflow Screen Options



Run a spell check of all the text boxes in workflow.

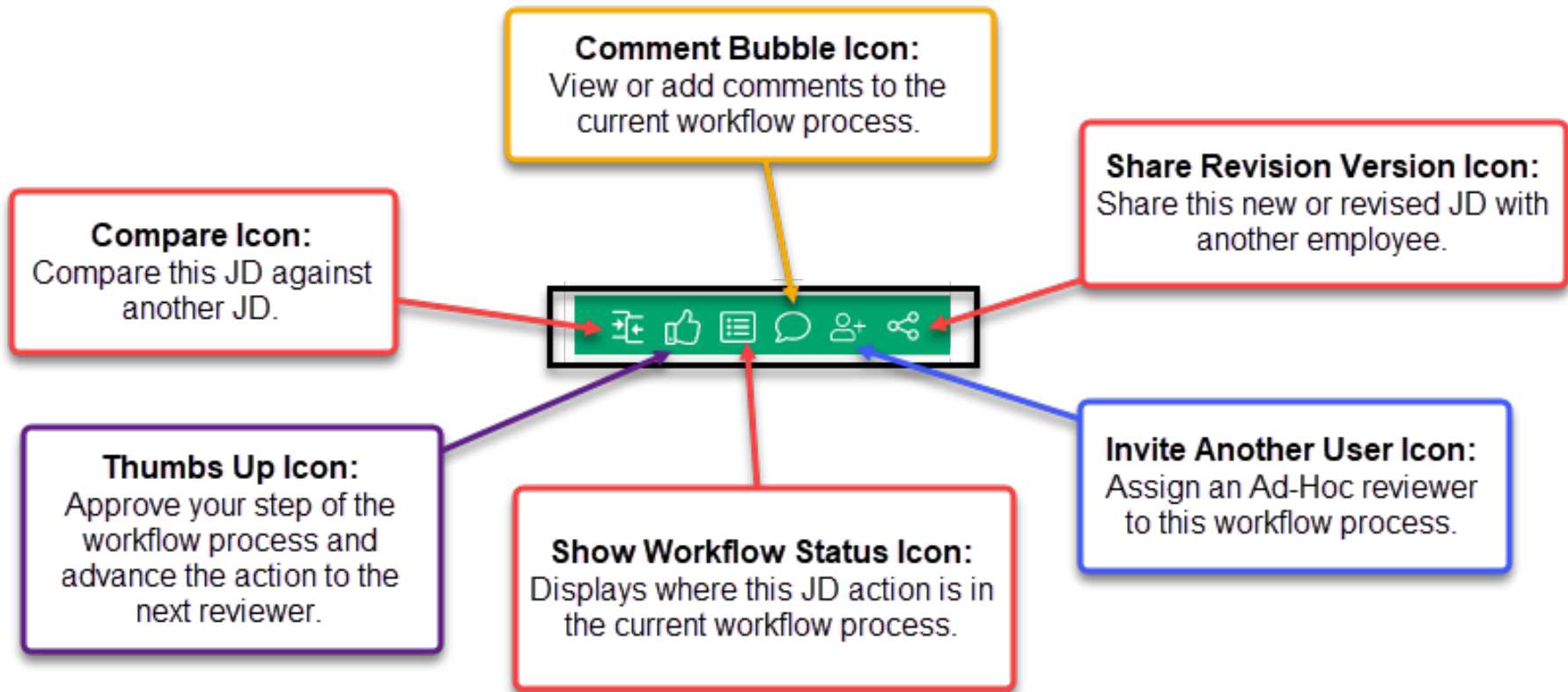
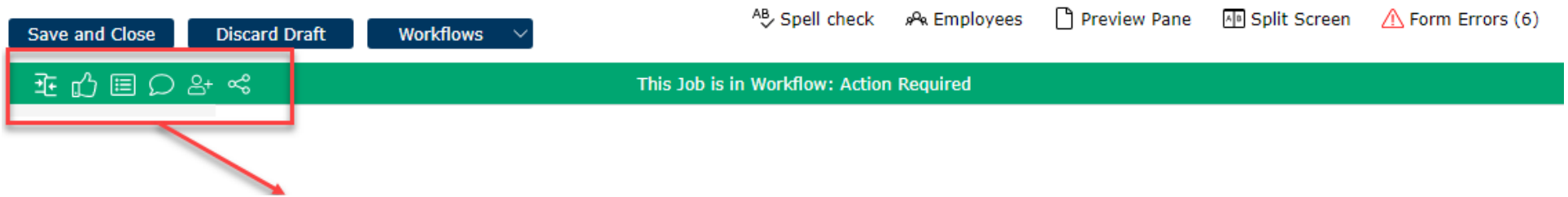
View the employee(s) linked to this JD.

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



## 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.

Save and Close   Discard Draft   Workflows

This Job is in Workflow: Action Required

Test Comp Analyst  Edit

**Please remember to save your work frequently.**

**JOB DETAILS**

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**

Archive this Job Description?	No
Approved Date:	10/21/2021 6:31:39 PM (PST)
Date Last Edited:	6/13/2024 6:37:08 PM (PST)
Last Action Approved:	HR Admin Update
Last Action Effective Date:	7/1/2022

**The Action Requested field must reflect the current action type. (Note: "Position Only Update (Posn Mgmt)" is for HR use only.)**

Select "Yes" from the drop down menu.

## Job Description (JD) Acknowledgement Process

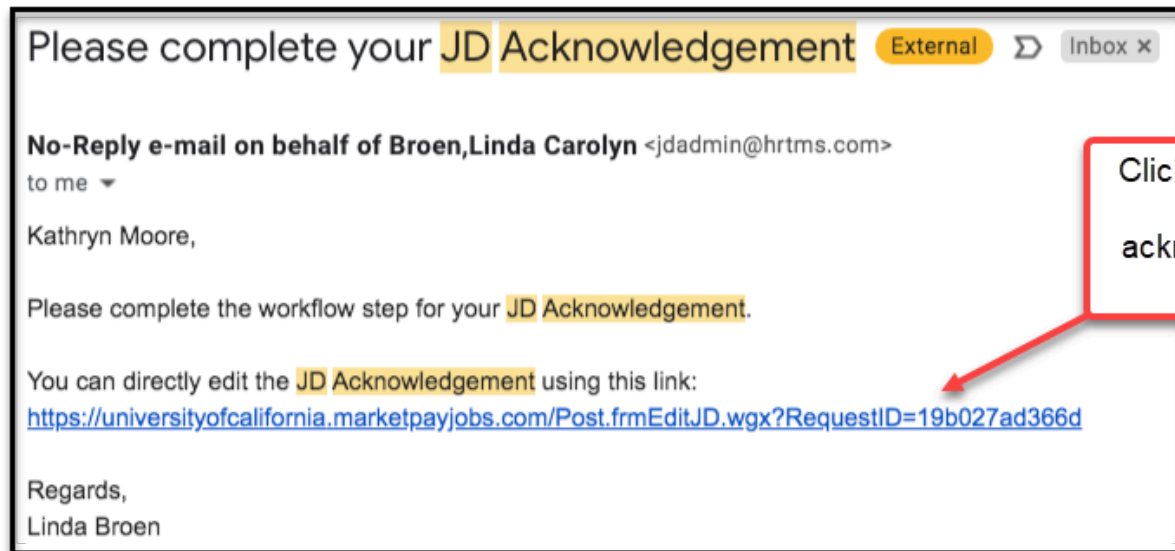
The **JD Acknowledgement** process is initiated when employees are newly hired, promoted to another position, reclassified, or have updates made to their job description.

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.

UC SANTA BARBARA | Job Builder

Job Review Portal

Hi Kathryn Moore

Job description acknowledgement for Moore, Kathryn Poling.

Instructions

Step 2: Review Job Description

© 2021 jdxpert

Privacy Policy

2 Click here to read the instructions for acknowledging receipt of your job description.

3 Click here to begin the acknowledgement process.

3. View your job description before acknowledging it.

UC SANTA BARBARA

Employee Acknowledgement

Associate name: Kathryn Moore

Manager Name: Lisa Romero

Job Description Title: Compensation Manager 1

Jobcode: 40035711

Job Description Acknowledgement:

1 View Job Description 'Compensation Manager 1 (40035711)'

2  I acknowledge that I have received and reviewed my job description.

\*\* Please click the above link to view Job Description 'Compensation Manager 1 (40035711)' before you can complete the acknowledgement.

\*\*\*

4 Click here to view your new or revised job description.

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

The screenshot shows a web browser window displaying a job description for 'COMPENSATION MGR 1 (000616)' at UC Santa Barbara. The interface is divided into a left sidebar and a main content area. The sidebar contains a 'Close Form' button, a 'Job Description' field, a 'Print Profile' dropdown, a 'Preview Job Description' section with radio buttons for 'PDF Format' and 'HTML Format', and a 'Download/Share Job Description' section with icons for PDF, Word, and other formats. The main content area displays the job title, 'Job History/Status' table, and 'Organization Details' section. Four numbered callouts are present: 5 (green) points to the main content area with the text 'Scroll down to view your job description.'; 6 (orange) points to the print icon with the text 'Print a copy of your job description, if you desire.'; 7 (red) points to the download icons with the text 'Download a PDF or Word version of your job description, if you desire.'; and 8 (red) points to the 'Close Form' button with the text 'Click "Close Form" when done viewing your JD.'

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.

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

The screenshot shows the 'Employee Acknowledgement' form. At the top, it lists the following information: Associate name: Kathryn Moore, Manager Name: Lisa Romero, Job Description Title: Compensation Manager 1, and Jobcode: 40035711. Below this, there is a section for 'Job Description Acknowledgement'. It contains a link 'View Job Description 'Compensation Manager 1 (40035711)'' and a checked checkbox with the text 'I acknowledge that I have received and reviewed my job description.' Below the checkbox, it states 'Compensation Manager 1 (40035711) was acknowledged by Kathryn Moore on 11/20/2021'. At the bottom of the form is a yellow button labeled 'Complete Workflow Step'. A red callout box on the left contains the text 'Check the box and then click on "Complete Workflow Step"'. Two red arrows originate from this box: arrow 9 points to the checkbox, and arrow 10 points to the 'Complete Workflow Step' button.

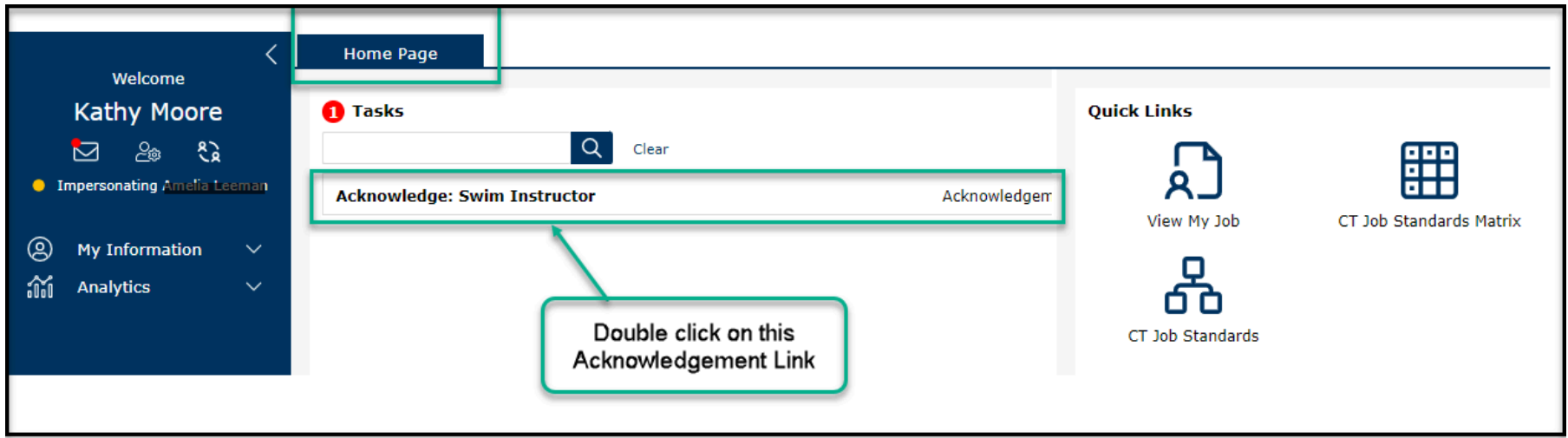
6. Finalize the acknowledgement process by checking the box and clicking "Confirm".

The screenshot shows the 'My Sign-Off' form. It contains a checked checkbox and the text '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.' Below this text is a grey button labeled 'Confirm' with a green checkmark icon to its left. A red callout box on the left contains the text 'Check the box and click "Confirm" to complete the JD acknowledgment process.' Two red arrows originate from this box: arrow 11 points to the checkbox, and arrow 12 points to the 'Confirm' button.

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 [logging in on page 3](#).
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

Manager Name

Department

Cycle

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
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Click on Accept to acknowledge receipt of your job description.

Accept

Close