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II. HRMS OVERVIEW

The Human Resources Management System (HRMS) is a collaboration between Human Resources, Information Technology Solutions (ITS), and our HR system users, as part of an ongoing effort to provide the campus with updated HR technology. The HRMS will centralize UCR developed HR tools into a single application and contain the following modules:

1. **Job Code Information** - Formerly UCR Title and Pay Plan (TPP) containing job code attribute information. The Job Code Module is UCR’s online repository of job classifications extended to UCR for use. Using the Job Code Information Module, you can search for available UCR job codes/titles and view the corresponding Fair Labor Standards Act (FLSA) Coverage, Personnel Program, Representation information, Job Standard/Series Concept, Salary Structure & Range, and Additional Pay Types (such as Shift Differentials & On-Call rates) as applicable.

2. **Job Builder** - Formerly UCR’s Career Tracks (CT) system and Job Description System (JDS). The Job Builder Module is UCR’s online repository of job descriptions. Based on your EACS role(s), using the Job Builder Module, you may be able to initiate a new job description, search, edit and approve modifications to existing job descriptions.

3. **Recruitment** - Replaces the existing iRecruit functionality. The Recruitment Module is UCR’s online repository of recruitment actions that have been initiated for recruitment. Based on your EACS role(s), using the Recruitment Module you may be able to initiate, edit, approve, view and search Recruitment actions. Recruitment and selection actions are also performed in this module.

4. **Review** - Formerly UCR’s iReview system. The Review Module is UCR’s online staff Reclassification, Reclassification Salary Review, and Equity review system. Based on your EACS role(s), using the Review Module, you may be able to initiate, edit, approve, finalize, view and search Review actions.

All modules were developed to provide a similar navigation and user experience as the Career Tracks system. Although the HRMS replaced UCR developed HR tools, current functionality will be maintained and, where possible, improved.
III. ROLES – RECRUITMENT

The following are the current Recruitment Module roles:

1. **Departmental HR Coordinator** - Responsible for initiating the requisition. They are responsible for ensuring an approved position number is used for recruitment. The coordinator prepares the recruitment profile, recruitment plan, and the job description. They ensure proper procedures for review and approval at the department level are met.

2. **Organizational HR Coordinator** - Responsible for ensuring the job description is appropriate based on organizational standards. The Organizational HR Coordinator may update or edit any unlocked fields of the job description. The Organizational HR Coordinator is responsible for ensuring the departmental recruitment is approved based on organizational standards. The coordinator may update or edit any aspect of the recruitment. Reviews recruitment prior to routing to HR Classification Analyst.

3. **HR Classification Analyst** - Responsible for ensuring job descriptions are classified correctly. The HR Classification Analyst ensures that position specific details align with the classification standards as described in either the Systemwide Career Tracks Job Standard or Series Concepts UCR specific standards, and that the classification determination is consistent across the campus.

4. **HR Recruitment Analyst** - Responsible for reviewing the recruitment details and posting the job description on the UCR Job Board.

5. **Affirmative Action Inquirer** - Affirmative Action Inquirer - The Affirmative Action Inquirer works with the Search Committee’s Affirmative Action Compliance Liaison (AACL) to ensure a diverse applicant pool exists. May provide guidance, upon request, to the AACL to ensure all aspects of the recruitment process are fair and unbiased and in compliance with Affirmative Action and Equal Opportunity laws. Provides diversity profile data, availability, and placement goals. Reviews and approves the interview short lists.

6. **Global Inquirer** - The role designed for the AVC of Human Resources, and/or their designee(s) acting on their behalf, has **no** Accountability Structure limitations. Provides Read-Only access to all details of Work in Progress (WIP), Posted, and Completed recruitments.

7. **Checkout Reviewer** – (non-EACS Role) – A staff or faculty employee who has a case checked out for review in any of the following modalities:
   - **Approval Required (Read-Only)** - Requires approval without the ability to make edits
   - **Approval Required (Read-Write)** - Requires approval with the ability to make edits.
   - **No Approval Required (Read-Only)** - Approval not required; only allows the ability to review the case.
   - **No Approval Required (Read-Write)** - Approval not required, but the ability to make edits to the case.
Ad Hoc Roles

8. **Other Roles** – Certain roles are unique to individual recruitments. If you are on a search committee you will be able to review the applicants and make comments, however only the Search Committee Chair / Chair’s Associate has access to the complete recruitments and the ability mark the final decision on each candidate and record hiring information.
IV. ROLES: EACS AND NON-EACS

<table>
<thead>
<tr>
<th>RECRUITMENT (JD) ACTION TYPES</th>
<th>HRMS RECRUITMENT MODULE EACS ROLES</th>
<th>HRMS RECRUITMENT MODULE NON-EACS ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate Recruitment</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Edit Work In Progress (WIP) Recruitment</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>If in the Role’s WIP / Waiting Queue</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Add Comments to Work In Progress (WIP) Recruitment If in the Role’s WIP / Waiting Queue</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Check Out Recruitment</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>“Approve” Check Out Recruitment</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>“Reject” Check Out Recruitment</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>“Complete” Check Out Recruitment</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Close Check Out Recruitment</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Submit To Org HR Coordinator</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Return to Dept HR Coordinator</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Submit To HR Classification Analyst</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Return to Org HR Coordinator</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Classify Recruitment</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>View All Open Work In Progress (WIP) Recruitments Based On EACS Accountability Structure/Roles</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>View all Open Work In Progress (WIP) Recruitments For All Orgs</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Update Recruitment After It is Classified</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Update Job Description After It is Classified</td>
<td>✔</td>
<td>❌</td>
</tr>
<tr>
<td>Push Recruitment To Recruit</td>
<td>❌</td>
<td>❌</td>
</tr>
<tr>
<td>Update Recruitment After It is Posted</td>
<td>✔</td>
<td>❌</td>
</tr>
<tr>
<td>Update Job Description After It is Posted</td>
<td>✔</td>
<td>❌</td>
</tr>
<tr>
<td>Push Updates On Recruitment To Recruit</td>
<td>✔</td>
<td>❌</td>
</tr>
<tr>
<td>Search HRMS Recruitment And Recruit</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>
V. TIPS AND NAVIGATION

- The HRMS functionality is designed to continuously save. The icon will display when automatically saving.
- The Tool Tip information icon will display for its associated field, when you hover your mouse.
- Character Count limitations: 4,000 for Position Custom Scope, 2,000 for Key Responsibilities
- To report any Job Description template punctuation, spelling, or grammar errors, contact your assigned HR Classification Consultant.
- The Required Fields banner displays fields that must be completed.
- Use the scroll function to access additional page sections and fields.
- System-generated email notifications are generated and will be sent out to affected EACS roles after each successful action.
- When working in the various screens, variants of the terms “Departmental HR Coordinator” and “Organizational HR Coordinator” may be seen. Please reference the following key:

<table>
<thead>
<tr>
<th>Departmental HR Coordinator</th>
<th>Organizational HR Coordinator</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department HR Coordinator</td>
<td>Organization HR Coordinator</td>
</tr>
<tr>
<td>Dept. HR Coordinator</td>
<td>Org (or ORG) HR Coordinator</td>
</tr>
</tbody>
</table>

HRMS uses **Breadcrumb Navigation.** “**Breadcrumbs**” typically appear horizontally across the top of the pages, often below title bars or headers. They provide links back to each previous page the user navigated through to get to the current page or the parent pages of the current one.

**CLICKING** the **BACK** button will close the current action and return the user to the previous HRMS action list.

**1.10** Red encircled numbers will indicate the location where the user need to take action

**a** Black lower-case letters will indicate a page feature and/or function.
A *Routing Queue / History Line* will display at the top of most pages, indicating where the current action in the process is taking place, and the furthest point of advancement. The line can move either forward or backward, depending upon the current action. The line will also display small box icons just above the line, indicating where a Check Out has taken place.

The *History* button, when clicked, provides an at-a-glance display of the Routing and Check Out activity.
When in the All Open and My WIP Recruitment pages, there are header categories that display. These header categories can be sorted in either ascending or descending order, by CLICKING on each header.

<table>
<thead>
<tr>
<th>All Open Recruitments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment ID</td>
</tr>
<tr>
<td>Filter</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>My WIP Recruitments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment ID</td>
</tr>
<tr>
<td>Filter</td>
</tr>
</tbody>
</table>

To assist with locating the specific Recruitment, the header categories – Recruitment ID, Working Title, Payroll Title, Dept Code, Dept Name, Routing Queue, and Created Date can be sorted in ascending or descending order by CLICKING on each header category title.

The Filter function can also be used to quickly find a recruitment, by typing any information that might be contained within this grid such as Payroll Title, Dept Code, or Dept Name.
VI. GETTING STARTED WITH HUMAN RESOURCE MANAGEMENT SYSTEM (HRMS)

If you have an EACS role for the Human Resources Management System (HRMS), you can access the link on R’Space under the “Authorized Apps” tab OR directly by navigating to https://hrms.ucr.edu. The HRMS Gateway page only displays modules for which you have an HRMS EACS role.

Welcome _____________________

Welcome to the UCR Human Resources Management System (HRMS). The HRMS is a UCR developed Staff HR Software Application containing the following modules: Job Code Information, Job Builder, Recruitment, and Review. The Job Builder, Recruitment, and Review modules are only visible to you if you have a corresponding EACS role. Mouse over each module tile for a brief description.

a) Job Code Information:

The Job Code Module is UCR’s online repository of job classifications extended to UCR for use. Using the Job Code Information Module, you can search for available UCR job codes/titles and view the corresponding Fair Labor Standards Act (FLSA) Coverage, Personnel Program, Representation information, Job Standard/Series Concept, Salary Structure & Range, and Additional Pay Types (such as Shift Differentials & On-Call rates) as applicable.

b) Job Builder:

The Job Builder module is UCR’s online repository of job descriptions. Based on your EACS role, using the Job Builder Module, you will be able to initiate a new job description, search, edit, and approve modifications to existing job descriptions.

c) Recruitment:

The Recruitment Module is UCR’s online repository of recruitment actions that have been initiated for recruitment. Based on your EACS role(s), using the Recruitment Module you may be able to initiate, edit, approve, view and search Recruitment actions. Recruitment and selection actions are also performed in this module.

d) Review:

The Review Module is UCR’s online staff Reclassification, Reclassification Salary Review, and Equity review system. Based on your EACS role(s), using the Review Module, you may be able to initiate, edit, approve, finalize, view and search Review actions.
Below is the Recruitment landing page.

**a) Initiate Recruitment**
Used to create a recruitment to fill a position which has been vacated by a staff member or to fill a newly created position.

**b) WIP Recruitment**
Consists of recruitments requiring action in the Work In Progress (WIP) queue and are based off of a user’s EACs role(s) and accountability structure(s).

**c) All Open Recruitment**
Displays all Work In Progress (WIP) recruitments that are within the HRMS Recruitment user’s accountability structure(s) and will display the queue in which the WIP recruitment is currently located.

**d) Completed/Pushed to iRecruit**
Displays all recruitments which have been completed and pushed to iRecruit, that are within the HRMS Recruitment user’s accountability structure(s). These are historical recruitments from the iRecruit system from 2010 to 2023.

**e) Posted Recruitment**
Displays all Posted Recruitments that are within the HRMS Recruitment user’s accountability structure(s).

**f) Recruitments to be Finalized**
Displays all recruitments to be finalized that are within the HRMS Recruitment user’s accountability structure(s).
g) **Finalized Recruitments**
   Displays all finalized recruitments that are within the HRMS Recruitment user’s accountability structure(s).

h) **Assign Default Chair’s Associate**
   Allows a user to assign the Chair’s Associate role for all recruitments that are within the HRMS Recruitment user’s accountability structure(s).

i) **Review Application Pools**
   Displays all recruitments on which the HRMS Recruitment user has a Search Committee role (i.e., Chair, Chair’s Associate, Member, Affirmative Action Compliance Liaison).

j) **Search Recruitments**
   Allows a user to locate Recruitments that are in the Work In Progress, Open, or Completed/Pushed to iRecruit queues, in the HRMS Recruitment module.
Departmental HR Coordinator Role

The Departmental HR Coordinator prepares the job description and ensures proper procedures for review and approval at the departmental level are met. The Departmental HR Coordinator is also responsible for initiating and maintaining the job description.

1. INITIATE TEMPLATE JOB DESCRIPTION

1.1. Initiating a Recruitment is the process in which a new recruitment is created. A new recruitment is created to fill a position which has been vacated by a staff member or to fill a newly created position.

1.2. CLICK on the Recruitment tile

1.3. CLICK on Initiate Recruitment tile
1.4. **SELECT** the **accountability structure** from the drop-down list. **Note:** Based on the user, the accountability structure options may be an entire organization, a division, or a specific department.

**SELECT** either:

1.5. **Create From Job Code** or **Copy An Existing Job Description**. **Note:** When using this option, have the job code available or use the decision tree.

1.6. **Copy From An Existing Job Description** to start with a previously classified job description. **Note:** When using this option, have the name of the person whose job description is being copied available or other identifiable information such as job code, job title etc.
2. INITIATE TEMPLATE JOB DESCRIPTION – CREATE FROM JOB CODE

2.1. The Create a new Job Description page displays. It provides two methods for selecting a Job Code, “Search By” or the “Decision Tree.

2A. USING THE DECISION TREE (Creating a New Job Description)

2.2. CHOOSE the Job Family by typing the Job Family description, or by CLICKING on the Job Family tile from the scrolling list. Note: Selecting the Job Family that best describes at least 50% of the position’s day-to-day activities and tasks. Do not focus on the type of organization that the position is in, focus on the kind of work being assigned.
2.3. **SELECT** a *Job Function* that best describes the **majority** of the work responsibilities assigned to this position (50% of the activities over the course of year). The Systemwide Job Standard Job Function Summary will display at the bottom of the screen when the cursor is held over the Job Function tile. **Note:** Only Job Functions **actively extended to UCR** will be displayed.

2.4. **SELECT** a *Role Responsibility* option.
**Note:** To assist with selecting the appropriate Job Category & Level for the position, answer the following questions. Alternatively, you can also skip this step; and choose a Job Title from the right.

If answer is “YES”:

---

**Financial Analysis Supervisory and Managerial Category**

Select the appropriate level for this position keeping in mind that the description should represent the majority of position’s day-to-day required activities (at least 50%) for most of their work time. The rating is focused on what is required from the position, NOT the capability of an Individual.
If answer is “NO”:

**Note:** Only Job Category and Levels actively extended to UCR will be displayed.

If answer is “NOT SURE”:

An incumbent in a Supervisory position supervises at least 2.0 FTE Career employees and performs supervisory functions where independent judgment is exercised in at least three of the following:

- Independently selects subordinates OR participates in the interviews and recommends who should be hired;
- Independently determines subordinates’ performance ratings OR recommends performance ratings;
- Independently decides within budgetary limitations the amount of subordinate merit increases, who will be selected for promotional opportunities, and whether to request the reclassification of a position, OR recommends these actions;
- Has independent authority to issue written warnings and suspensions and determines what discipline should be imposed upon a subordinate OR recommends such actions;
- Has independent authority to resolve grievances or complaints OR formulates and recommends a resolution to grievances or complaints.
2.5. **SELECT** the desired level from the list displayed.

2.6. Once the Job Code title is identified, review the Job Description Overview by scrolling through *Template Job Description* based upon established Career Tracks job standard.

If this is the Job Code Title desired, **CLICK** the **START JOB DESCRIPTION** button. If it isn’t correct, go back and review other Job Code Titles.

It is important to note that once the **START JOB DESCRIPTION** button has been clicked, the Job Code selected **cannot** be changed for a Template Job Description. For **Non-Template**, the Job Code can be changed at any time during the life cycle of the proposed Job Description process.
2B. CREATING A NEW JOB DESCRIPTION (USING THE SEARCH BY FIELD)

2.7. When searching for a known job code, ENTER the code or a keyword into the Search By Field.

Once the Job Code title is identified, review the Template Job Description based upon established Career Tracks job standards. If this is the Job Code Title desired, SELECT START JOB DESCRIPTION. If it isn’t correct, go back and review other Job Code Titles.
3. COPYING AN EXISTING JOB DESCRIPTION

3.1. From the *Initiate a Job Description* pop-up, SELECT the *COPY AN EXISTING JOB DESCRIPTION* button.

3.2. The *Copy Job Description* page displays.

3.3. Search for the job description by using one or more of the filter fields shown, then CLICK SEARCH.

3.4. CLICK the slider next to *Include Inactivated JDs* to view both "classified" and "inactivated" Job Descriptions that meet the specified criteria.

**Note:** The search criteria will auto populate the user HRMS Job Builder accountability structure(s) under “Filter by Org/Dept”. To search for job descriptions outside of their accountability structure, remove the criteria in the “Filter by Org/Dept” field.
3.5. A listing of found job descriptions meeting the selected criteria from the search performed will appear in a list below the "Copy Job Library" search box.

3.6. To view a Job Description, CLICK the eye icon on the row for the Job Description you want to review.

3.7. To create a copy of a job description, CLICK the double paper icon on the row for the Job Description you want to copy, which will direct the user to a newly created job description.

   The newly created job description will contain some data from the job description it was copied from, but not all, and will be in edit mode.

3.8. Refer to the relevant User Guide section for information about Template or Non-Template Job Descriptions to proceed with the remaining actions required.
4. JOB DESCRIPTION OVERVIEW

Below the JD ID and Job Code line is the **Required Fields** banner. By **CLICKING** on the **Click to Expand** icon, all of the required fields within the job description that must be completed are displayed.

⚠️ The job description is missing some required information. The following fields must be completed before the job description can be classified. ⚠️ Click to Expand.
4.1. **CLICK** the **Click to Expand** icon.

4.2. The **Required Fields** banner displays all actions that must be completed before a job can be classified.

**Note:** When a required action is satisfied, it no longer displays in the **Required Fields** banner. Should an action/field previously satisfied become unsatisfied, it will re-appear in the Required Fields banner.

4.3. Each **Required Field** will be in bold type, followed by the **required action**. The **tab location** for each Required Field will display in parentheses, at the end of each Required Field line. For the Job Builder example, the **Required Fields** include the following:

<table>
<thead>
<tr>
<th>REQUIRED FIELD</th>
<th>ACTION TYPE</th>
<th>TAB LOCATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working Title</td>
<td></td>
<td>(JID Overview tab)</td>
</tr>
<tr>
<td>Department</td>
<td></td>
<td>(JID Overview tab)</td>
</tr>
<tr>
<td>Department Head</td>
<td></td>
<td>(JID Overview tab)</td>
</tr>
<tr>
<td>Supervisor</td>
<td></td>
<td>(JID Overview tab)</td>
</tr>
<tr>
<td>HEERA Code</td>
<td></td>
<td>(JID Overview tab)</td>
</tr>
<tr>
<td>Position Custom Scope</td>
<td></td>
<td>(JID Overview tab)</td>
</tr>
<tr>
<td>Key Responsibilities</td>
<td></td>
<td>(Key Responsibilities tab)</td>
</tr>
<tr>
<td>Working Environment</td>
<td></td>
<td>(Environment tab)</td>
</tr>
<tr>
<td>Items Used</td>
<td></td>
<td>(Other Requirements tab)</td>
</tr>
<tr>
<td>Physical Requirements (Bend, Sit, Squat, Stand, Crawl, Walk, Climb)</td>
<td></td>
<td>(Other Requirements tab)</td>
</tr>
<tr>
<td>Mental Requirements (Read/Comprehend, Write, Perform Calculations, Communicate Orally, Reason &amp; Analyze)</td>
<td></td>
<td>(Other Requirements tab)</td>
</tr>
<tr>
<td>Environmental Requirements (Is exposed to excessive noise, is around moving machinery, is exposed to marked changes in temperature and/or humidity, Drives motorized equipment, Works in confined quarters, Dust, Fumes)</td>
<td></td>
<td>(Other Requirements tab)</td>
</tr>
<tr>
<td>Critical Position</td>
<td></td>
<td>(Critical Position tab)</td>
</tr>
<tr>
<td>JD Attachments</td>
<td></td>
<td>(JID Attachments tab)</td>
</tr>
</tbody>
</table>

4.4.

- Working Title
- Department
- Department Head
- Supervisor
- HEERA Code
- Position Custom Scope
- Key Responsibilities
- Working Environment
- Items Used
- Physical Requirements
- Mental Requirements
- Environmental Requirements
- Critical Position
- JD Attachments
4.5. **CLICK** the **Click to Collapse** icon to collapse the Required Field Banner.

4.6. The **Job Description** sections may be accessed by either **CLICKING** directly on the tab, or by **CLICKING** on the **Previous Section** and **Next Section**
CLICK to cancel a Job Description. Once cancelled, it CANNOT be retrieved. Note: Reclassification Proposed Job Descriptions do not have this function.
4.7. **Effective Date** is not required to be entered; however, should be if an Employee is added to the job description. Note: When creating a proposed job description for a Review case, the Reclassification effective date is auto-populated.

4.8. **ENTER a Working Title.**

4.9. The **Employee** is not required to be entered; however, should be if the employee is known.

**TYPE** either the Employee’s Name as shown in the payroll system or their UCR NetID.

**Note:** When creating a proposed job description for a Review case, the employee name is auto-populated.

**Note:** This field will auto-populate with name suggestions, based on the characters entered. Upon selecting the employee, their **Name** and **Employee ID** displays.
4.10. **SELECT** the *Department*. The available department(s) in the list are based on the *Accountability Structure* selected when initiating the job description.

![Department dropdown](image)

4.11. **ENTER** the *Supervisor* name by either their name as shown in the payroll system, or their UCR NetID.

*Note:* This field will auto-populate with name suggestions, based on the characters entered. Upon selecting the Supervisor, their Name, Title Code, Payroll Title, Grade, Working Title, Phone, and Email displays.

![Supervisor entry](image)

4.12. **ENTER** the *Department Head* name by either their name as shown in the payroll system, or their UCR NetID.

*Note:* This field will auto-populate with name suggestions, based on the characters entered. Upon selecting the Department Head, their Name, Title Code, Payroll Title, Grade, Working Title, Phone, and Email displays.

![Department Head entry](image)
4.13. The **Personnel Program Code** field is auto-populated according to the selected Job Code.

4.14. The **FLSA** field is auto-populated according to the selected Job Code.
4.15. **ENTER** the appropriate HEERA Code. **CLICKING** on the HEERA Code hyperlink will direct you to the UCR Employee Relations (EREL) Code Chart. The chart will assist in determining the proper HEERA Code to select.

![](HEERA_Code.png)

4.16. The **Grade** field is auto-populated according to the selected Job Code.

**Note:** Most job codes will auto-populate the Grade, but there are exceptions, such as By Agreement (BYA) positions where a Grade must be selected.

4.17. If the position has supervisory responsibilities:

   a. **ENTER** the Job Code or Job Title for the Employees as represented in the HR Payroll system.
   
   b. **ENTER** the FTE value and **CLICK** the ADD button.

**Note:** The Position(s) Directly Supervised should match the Organizational Chart that will be uploaded under the JD Attachments tab.

Additionally, the FTE value should represent the total number of FTEs (i.e., 0.5, 0.75, 1.0, 1.5, etc.) of all Employees in the specified classification, versus the number of positions.
4.18. The **Generic Scope** field is auto-populated from the UCOP Job Standard and cannot be edited.

**Generic Scope**

Experienced professional who knows how to apply theory and put it into practice with in-depth understanding of the professional field; independently performs the full range of responsibilities within the function; possesses broad job knowledge; analyzes problems/issues of diverse scope and determines solutions.

4.19. The **Custom Scope** field is auto-populated from the UCOP Job Standard and cannot be edited.

**Custom Scope**

Uses skills as a seasoned, experienced professional with a full understanding of industry practices and organizational policies and procedures; resolves a wide range of issues in imaginative as well as practical ways. Works on problems of diverse scope where analysis of data requires evaluation of identifiable factors. Demonstrates good judgment in selecting methods and techniques for obtaining solutions. Contacts are both internal and external to the department.

4.20. The **Level of Supervision Received** field is auto-populated from a UCR established standard, based off the **Career Tracks** category and level, and cannot be edited.

**Level of Supervision Received**

**General Supervision** - The incumbent develops procedures for performance of a variety of duties; or performs complex duties within established policy guidelines.

4.21. The **Position Custom Scope** should be a statement of the major purpose of a position and its role in the Unit/Department/Organization.

The **Position Custom Scope** should clearly indicate the role of position as well as the reason why the position exists. This is not an exhaustive list of duties, nor is it a marketing description.
5. KEY RESPONSIBILITIES

5.1. NAVIGATE to the Key Responsibilities tab, or the Next

A Key Responsibility is the detailed expectations of a position’s purpose, and describes the essential functions of the job. The Key Responsibilities will display in descending order, based upon the percentage of time assigned; they must add up to 100%. Note: There are two types of Key Responsibilities: Locked and Custom.
The following information describes the Key Responsibilities and the navigation to add and/or modify key responsibilities to equal 100%. The **Key Responsibility** will display in descending order, based upon the percentage of time assigned.

### 5.2. **Locked Key Responsibilities:**

- **a. Locked Key Responsibilities** are derived from the UCOP Job Standard, and are identified by the **padlock** icon on the right-hand side of the screen.
- **b.** The prepopulated percentage of time for each **Locked Key Responsibility** can be changed by **CLICKING** on the **pencil** icon. If a **Locked Key Responsibility** does not apply to the position, the percentage of time may be changed to **0%**.

**Note:** **Locked Key Responsibilities** assigned 0% will be evaluated to determine if the requested classification is appropriate, or if a different, possibly lower, level classification better represents the scope of work that is expected to be performed by the position.

**Note:** UCR has established that **Locked Key Responsibilities** must represent at least 60% of the total **Key Responsibilities**.

- **c.** Additional information can be added to each **Locked Key Responsibility** by **CLICKING** on the **plus** icon. The additional information will display beneath the **Locked Key Responsibility** as a bullet point, and may be used to further clarify the **Locked Key Responsibility**, but should not be in direct conflict with the **Locked Key Responsibility**, and must be within the scope of the **Locked Key Responsibility**.

Save your changes by **CLICKING** the **Save** icon.

Cancel changes by **CLICKING** the **X**.
5.3. **NAVIGATE** to the *Key Responsibilities* tab, or the *Next Custom Key Responsibilities* may be added in the field located at the bottom of the *Key Responsibilities* section. **ENTER** the full text of the *Custom Key Responsibility* in the text field.

5.4. Add up to 40% of department specific key responsibilities that are not in conflict with the position’s Job Standard. **SELECT** the appropriate *percentage* of time.

5.5. **CLICK** the **ADD** button.

5.6. To **delete** a Custom Key Responsibility, **CLICK** on the *Trashcan* icon.

A **message** will display, asking you to either **confirm** or **cancel** the deletion.

5.7. **CLICK** the **DELETE** button to delete the Key Responsibility.
6. EDUCATION & EXPERIENCE

6.1. NAVIGATE to the Education & Experience tab, or the Next Section

6.2. Entries in the Education and Experience section should include the minimum level and type of education, experience, licenses, certifications, and/or educational conditions required for the classification level, as well as any acceptable equivalence (e.g. “…and/or equivalent experience/training.”).

6.3. Additional preferred items can be added to the education section, but cannot be in conflict with the Job Standard. All other sections on this tab can have both required and/or preferred items added, but cannot be in conflict with the Job Standard and should be relevant to the position.

**Note:** Custom addition(s) can be deleted by CLICKING on the Trashcan icon next to the item.
6.4. The **Locked Education Requirements** fields are derived from the **UCOP Job Standard**, and cannot be edited or deleted. Only **Preferred Education Requirements** can be added in the “**Add New Education Requirement**” text field.
6.5. The **Locked Experience Requirements** fields are auto-populated from a UCR established standard, based off the **Career Tracks** category and level, and cannot be edited. You may include additional **Required** and/or **Preferred Experience Requirements** as long as they are in alignment with the UCOP Job Standard and/or the UCR established standards. The text boxes display examples of how you may enter the additional Experience Statement; the first two boxes are optional, however the third box must be completed. The dropdown menu allows you to indicate if the Experience Statement is a **Required** or **Preferred Experience Requirement**.

![Experience Requirements Table]

6.6. **Locked Licenses** fields, if any, are derived from the UCOP Job Standard, and cannot be edited nor deleted. **ENTER** any additional **License(s)**, and **SELECT** whether the requirement is **Required** or **Preferred**.

![License Requirements Table]

6.7. **Locked Certification** fields, if any, are derived from the UCOP Job Standard, and cannot be edited nor deleted. **ENTER** any additional **Certification(s)** and **SELECT** whether the requirement is **Required** or **Preferred**.

![Certification Requirements Table]

6.8. **Locked Education Condition** fields, if any, are derived from the UCOP Job Standard, and cannot be edited nor deleted. An Educational Condition may need to be met within a specific
time frame or may be ongoing; for example, obtaining a certification within 6-months of appointment begin date.

6.9. **ENTER** any additional *Education Condition(s)* and **SELECT** whether the requirement is *Required* or *Preferred*.
7. KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

7.1. NAVIGATE to the Knowledge and Skills tab.

7.2. Knowledge, Skills, and Abilities should correlate to the Key Responsibilities. Locked KSAs are derived from the UCOP Job Standard.

7.3. Skill: Can be generally taught or learned, and is acquired through direct experience.

7.4. Knowledge: Can be learned through formal training or acquired through direct experience.

7.5. Ability: A natural aptitude (i.e., to speak, climb); can be enhanced through professional experience (e.g., making oral presentations).

Note: These are used to screen candidates as qualified, not qualified, and/or preferred.
7.6. The locked KSA fields are derived from the UCOP Job Standard, and cannot be edited nor deleted, but can be switched between Required or Preferred by CLICKING the pencil icon.

7.7. Custom KSAs may be added in the “Add Knowledge/Skill/Ability” field located at the bottom of the Description section. TYPE a description of the Custom KSA. SELECT either Required or Preferred. CLICK the ADD button.

7.8. There are two ways to add a Special Requirement & Condition:

a. CLICK in the Special Requirement/Condition field, select from the pre-populated list, SELECT whether the item is Required or Preferred, and CLICK the ADD button.

b. CLICK in the Special Requirement/Condition field, TYPE in the relevant text, CLICK Enter on the keyboard, SELECT whether the item is REQUIRED or Preferred, and CLICK and Add button.
8. ENVIRONMENT

8.1. Navigate to the Environment tab.

8.2. The Environment describes the location where the incumbent will be working.

8.3. Select the corresponding Working Environment for the position; only one selection is permitted. If none of the options apply, select "Other" and type in the "Custom Environment" text box (e.g. UCOP IntelliCenter).
9. OTHER REQUIREMENTS

9.1. NAVIGATE to the OTHER REQUIREMENTS tab, or the Next Section button.

9.2. The Other Requirements section describes items used, physical demands, mental demands, and environmental conditions that are required to perform the key responsibilities of the position.

Note: These may be used in workplace accommodation discussions.
9.3. **ENTER** the relevant *Items Used* for the position. There are two ways to add *Items Used*:

a. **CLICK** in the *Items Used* field and **SELECT** from the pre-populated list.
b. **CLICK** in the *Items Used* field, type in the relevant text and **CLICK** enter on your keyboard.

The *Definitions of Requirements* will assist you in completing the *Physical Requirements* and *Mental Requirements*. Refer to the percentages of time to ensure your selections are consistent with the needs and expectations of the position.

9.4. **SELECT** the frequency for each *Physical Requirement* that is expected to routinely be required of the position. *Custom physical requirements(s)* can be added in the *Other* text box field.
9.5. Select the frequency for each *Mental Requirement* that is expected to routinely be required of the position. *Custom mental requirement(s)* can be added in the *Other* text box field.
9.6. For each *Environmental Requirement* that the position is expected to be exposed to mark Yes or No. Custom Environmental Requirement(s) can be added in the *Other* text box field. **Note:** When *Yes* is selected for "Drives motorized equipment" a help message box will display to ensure that it should be marked as *Yes* and that other corresponding information in the job description is completed.
10. CRITICAL POSITION

10.1. NAVIGATE to the OTHER REQUIREMENTS tab, or the Next Section button.

10.2. Professional and Support Staff (PSS) positions only: Refer to UCR Local Procedure 21: Selection and Appointment, Critical Position Questionnaire. Management and Senior Professional (MSP) positions are automatically designated as critical.
10.3. Review the Critical Position questionnaire, if answering Yes to at least one response question select the Yes radio button.

If the personnel program of the job code is a Management Senior Professional (MSP), then the system will default to Yes and will not be editable.
11. **JD ATTACHMENTS**

11.1. **NAVIGATE** to the **JD ATTACHMENTS** tab, or the **Next Section** button.

11.2. **Job Description Attachments** should be specifically relevant to the review and classification of the job descriptions and/or should be specifically relevant details to the employee’s classification held during the corresponding time of the job description.

Examples include, but are not limited to: Organizational Chart, Approved Waivers of Recruitment, Employment Contracts, information relevant to the requested positions Empl Class, etc.

11.3. **CLICK** in the **Drop files to upload** field.

11.4. **NAVIGATE** to the location on your machine that contains the Org Chart for this Job Description.
11.5. **CLICK** on the **Org Chart**.

11.6. A **current Organizational chart** which includes the position the job description is for must be uploaded on the JD Attachments tab.

11.7. After uploading the file, **SELECT “OrgChart”** from the **TYPE** drop-down menu.

11.8. The **OrgChart** is automatically uploaded, and the attachment information displays.

11.9. Other files specifically relevant to the job description classification action may also be uploaded on the **JD Attachments** tab. **Note**: When a job description is being created through either the **HRMS Recruitment** or **Review** modules, documents directly related to the **Recruitment** or **Review** action should not be uploaded on the **JD Attachments** tab, but rather on the **Recruitment** or **Review Attachment** tab.
12. JD COMMENTS

12.1. NAVIGATE to the JD COMMENTS tab, or the Next Section button.

12.2. Job Description Comments should be details relevant to the submission, review, and classification of the job description.

**Note:** The JD Comments tab is only available when initiating or updating a job description from the HRMS Job Builder module.

12.3. A user can add a comment by CLICKING and TYPING in the "Enter your comments here" text box and then CLICKING the Add Comment button. Comment(s) should provide context and/or background information about the action request for various reviewers of the action.

12.4. A user can edit only their own comment(s) by CLICKING on the pencil icon. An Edited icon displays when a comment has been edited.
12.5. A user can **delete** only their own comment(s) by **CLICKING** on the **trash can** icon.
13. REVIEW & SUBMIT

13.1. NAVIGATE to the REVIEW AND SUBMIT tab, or the Next Section button. The Review & Submit page displays.

13.2. The Review & Submit tab displays a full version of all fields completed in the job description, and is displayed for the user’s review.
13.3. **REVIEW** the full job description for any changes or updates that may be necessary before selecting a JD Action option.

13.4. To **edit** a field, determine which tab the field is on and **NAVIGATE** to the tab by selecting the corresponding tab directly or by scrolling through each tab using the **Previous Section** and Next Section buttons located at top and the bottom of each tab.

**Note:** The **Review & Submit** tab will not display information from the **JD Attachments** or **JD Comments** tab.
14. JOB DESCRIPTION OVERVIEW – NON-TEMPLATE

DEPARTMENT HR COORDINATOR/ORGANIZATIONAL HR COORDINATOR ROLE

14.1. The Required Fields banner displays all actions/fields that must be completed before a job description can be classified.
Note: When a required action/field is satisfied, it no longer displays in the Required Fields banner. Should an action/field previously satisfied become unsatisfied it will reappear in the Required Fields banner.

14.2. **CLICK** on the  
icon to expand the **Required Fields** banner.

14.3. **CLICK** on the — icon to collapse the **Required Fields** banner.

14.4. The **Job Description** sections may be accessed by either **CLICKING** directly on the tab, or by **CLICKING** on the **Previous Section** and **Next Section** buttons.
### BLANK AST 3

**Job Description Overview**

- **Effective Date (MM/DD/YYYY)**: 
- **Working Title**: 
- **Employee**: 
- **Department**: 
- **Supervisor**: 
- **Department Head**: 
- **Job Code**: 004722
- **Representation**: 
- **Position(s) Directly Supervised (If applicable)**: 
- **Level of Supervision Received**: 

- A level of supervision has not been determined
- Position Custom Scope

**Notes:**
- 14.5: Key Responsibilities
- 14.6: Effective Date
- 14.7: Employee Information
- 14.8: Department Information
- 14.9: Supervisor Information
- 14.10: Department Head Information
- 14.11: Job Code Information
- 14.12: Representation Information
- 14.13: Position(s) Directly Supervised
- 14.14: Level of Supervision
- 14.15: Position Custom Scope

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**UCR HUMAN RESOURCE MANAGEMENT USER GUIDE - RECRUITMENT**

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14.5. The *Effective Date* is not required to be entered; however, should be if an Employee is added to the job description.

14.6. **ENTER a Working Title.**

14.7. **Employee** is not a required to be entered, however should be if the employee is known. Enter the Employee name by either their *name* as shown in the payroll system or their UCR NetID.

**Note:** This field will auto-populate with name suggestions, based on the characters entered. Upon selecting the employee, their *Name* and *Employee ID* displays.

14.8. **SELECT the Department.** The available department(s) on the list are listed based on the Accountability Structure selected when initiating the job description.
14.9. **ENTER** the *Supervisor* name by either their Name as shown in the payroll system or their NetID.

**Note**: This field will auto-populate with name suggestions, based on the characters entered. Upon selecting the supervisor, their Name, Title Code, Payroll Title, Grade, Working Title, Phone, and Email displays.

14.10. **ENTER** the *Department Head* name by either the Department Head name as shown in the payroll system or their UCR NetID. **Note**: This field will auto-populate with name suggestions, and a description for your selection. Upon selecting the supervisor, their Name, Title Code, Payroll Title, Grade, Working Title, Phone, and Email displays.

14.11. The *Job Code* field will auto-populate with the job code selected upon initiating the job description. However, the job code can be edited to another available Non-Template job code.

14.12. The *Representation* field is auto-populated according to the selected Job Code.
14.13. The **Personnel Program Code** field is auto-populated according to the selected Job Code.

```
Personnel Program Code
 vandal - Professional & Support Staff
```

14.14. The **FLSA** field is auto-populated according to the selected Job Code. The **Job Code** field will auto-populate.

```
FLSA
 Exempt
```

14.15. **ENTER** the appropriate **HEERA** Code. **CLICKING** on the **HEERA Code** hyperlink will direct you to the **UCR Employee Relations (EREL) Code Chart**. The chart will assist in determining the proper HEERA Code to select.

```
HEERA Code

A - Manager, Not Confidential
B - Manager, Confidential
C - Supervisor, Not Confidential
D - Supervisor, Confidential
E - All others, Not Confidential
F - All others, Confidential
G - Not covered by HEERA (out of State)
```

14.16. The **Grade** field is auto-populated as **No Selection Required**. **Note:** Most job codes will auto-populate as **No Selection Required**, but there are exceptions, such as **Non-Represented Legacy MSP Job Codes** where a **Grade** must be selected.

```
Grade
 No Selection Required
```
14.17. If the position has supervisory responsibilities:
14.18. ENTER the Job Code/Job Title for the employees as represented in the HR Payroll system.
14.19. ENTER the FTE value.
14.20. CLICK the ADD button.

**Note:** The Position(s) Directly Supervised should match the Organizational Chart that will be uploaded under the JD Attachments tab. Additionally, the FTE value should represent the total number of FTEs (i.e., 0.5, 0.75, 1.0, 1.5, etc.) of all employees in the specified classification, versus the number of positions.

14.21. CLICK on the arrow to select the Level of Supervision Received expected to be given by the direct supervisor for the position. This should align, when applicable, with what is indicated in the "class concept" for the classification selected.

**Note:** Specific "class concepts" details can be found within the Series Concept for the selected classification. The Job Code Information module may contain a link to the Series Concept for the classification after searching for the job code.
14.22. The **Position Custom Scope** should be a statement of the major purpose of a position and its role in the Unit / Department / Organization.

14.23. The **Position Custom Scope** should clearly indicate the role of position as well as the reason why the position exists. This is not an exhaustive list of duties, nor is it a marketing description.
15. KEY RESPONSIBILITIES – NON-TEMPLATE

15.1. **NAVIGATE** to the **KEY RESPONSIBILITIES** tab. or the **Next Section** button.

15.2. **A Key Responsibility** is the detailed expectations of a position’s purpose and describes the essential functions of the job.

15.3. The **Key Responsibilities** will display in descending order, based upon the percentage of time assigned; they must add up to 100%.

15.4. **CLICK** in the **Key Responsibilities** field to add a responsibility.

15.5. Indicate the percentage of time that this position will spend on the corresponding responsibility then **CLICK** the **ADD** button.
16. EDUCATION & EXPERIENCE – NON-TEMPLATE

16.1. NAVIGATE to the EDUCATION & EXPERIENCE tab. or the Next Section button.

16.2. Entries in the Education & Experience section should include the minimum level and type of education, experience, licenses, certifications, and/or educational conditions required for the classification level, as well as any acceptable equivalence (e.g. “…and/or equivalent experience / training.”). Additional preferred items relevant to the position can be added all other sections on this tab.

Note: Custom addition(s) can be deleted by CLICKING on the Trashcan icon next to the item.
16.3. The **Education Requirement** fields should include anything specified in the class concept for the selected classification.

Other educational requirements beyond what is indicated in the class concept can be added, however should not be in conflict of what is indicated in the class concept. Each **Education Requirement** should indicate if it is **Required** or **Preferred**.

![Education Requirements](image)

16.4. **CLICK** the **ADD** button.

16.5. The **Experience Requirement** fields should include anything specified in the class concept for the selected classification. Other experience requirements beyond what is indicated in the class concept can be added, however should not be in conflict of what is indicated in the class concept. Each **Experience Requirement** should indicate if it is **Required** or **Preferred** by **CLICKING** the dropdown menu.

**Note**: The text box displays an example of how to enter an additional **Experience Requirement**. The first two boxes are optional. The third box must be completed in order to add an **Experience Requirement**.

![Experience Requirements](image)

16.6. **CLICK** the **ADD** button.

16.7. The **License Requirement** fields should include anything specified in the class concept for the selected classification. Other license requirements beyond what is indicated in the class concept can be added, however should not be in conflict of what is indicated in the class concept. Each License Requirement should indicate if it is **Required** or **Preferred** by **CLICKING** the dropdown menu.

![License Requirements](image)

16.8. **CLICK** the **ADD** button.
16.9. The **Certification Requirement** fields should include anything specified in the class concept for the selected classification. Other certification requirements beyond what is indicated in the class concept can be added, however should not be in conflict of what is indicated in the class concept. Each **Certification Requirement** should indicate if it is **Required** or **Preferred** by CLICKING the dropdown menu.

16.10. CLICK the **ADD** button.

16.11. The **Educational Condition Requirement** fields should include anything specified in the class concept for the selected classification. Other educational condition requirements beyond what is indicated in the class concept can be added, however should not be in conflict of what is indicated in the class concept. Each **Educational Condition Requirement** should indicate if it is **Required** or **Preferred** by CLICKING the dropdown menu.

16.12. CLICK the **ADD** button.
17. KNOWLEDGE, SKILLS & ABILITIES (KSAs)- NON-TEMPLATE

17.1. NAVIGATE to the Knowledge & Skills tab, or the Next Section button.

17.2. Knowledge, Skills, and Abilities should correlate to the Key Responsibilities.

17.3. Skill: Can be generally taught or learned, and is acquired through direct experience.

17.4. Knowledge: Can be learned through formal training or acquired through direct experience.

17.5. Ability: A natural aptitude (i.e., to speak, climb); can be enhanced through professional experience (e.g., making oral presentations).

Note: These are used to screen candidates as qualified, not qualified, and/or preferred.
17.6. The **Knowledge, Skills and Abilities** (KSAs) fields should include anything specified in the class concept for the selected classification. Other KSAs requirements beyond what is indicated in the class concept can be added, however should not be in conflict of what is indicated in the class concept. Each **Knowledge, Skills & Abilities** should indicate if it is **Required** or **Preferred** by CLICKING the dropdown menu.

**Note:** At least one (1) Required KSA must be added.

17.7. The **Special Requirements & Conditions** fields should include anything specified in the class concept for the selected classification. Other Special Requirements & Condition requirements beyond what is indicated in the class concept can be added, however should not be in conflict of what is indicated in the class concept. Each **Special Requirement & Condition** should indicate if it is **Required** or **Preferred** by CLICKING the dropdown menu.

17.8. There are **two ways** to add a **Special Requirement & Condition**:

a. CLICK in the Special Requirement/Condition field.

b. OPTION 1: SELECT from the pre-populated list

OR,

c. OPTION 2: TYPE in the relevant text, and CLICK ENTER on your keyboard.

d. SELECT whether the item is **Required** or **Preferred**.

e. CLICK the ADD button.

Additional **Special Requirements & Conditions** may be added by repeating the steps above.
18. ENVIRONMENT - (NON-TEMPLATE)

18.1. **NAVIGATE** to the *Environment* tab, or the **Next Section** button.

18.2. The *Environment* describes the **location** where the incumbent will be working.

18.3. **SELECT** the relevant *Working Environment* for the position; only one selection is permitted. If none of the options apply, **SELECT** “Other” and type in the “**Custom Environment**” text box (e.g.: UCOP).
19. OTHER REQUIREMENTS (NON-TEMPLATE)

19.1. NAVIGATE to the OTHER REQUIREMENTS tab, or the Next Section button.

19.2. The Other Requirements section describes items used, physical demands, mental demands, and environmental conditions that are required to perform the key responsibilities of the position.

NOTE: These may be used in workplace accommodation discussions.
19.3. ENTER the relevant *Items Used* for the position.

There are two ways to add *Items Used*:

a. CLICK in the *Items Used* field and SELECT from the pre-populated list.

b. CLICK in the *Items Used* field, TYPE in the relevant text and CLICK enter on your keyboard.

19.4. The **Definitions of Requirements** will assist you in completing the **Physical Requirements** and **Mental Requirements**.

Refer to the percentages of time to ensure your selections are consistent with the needs and expectations of the position.

19.5. Select the frequency for each **Physical Requirement** that is expected to routinely be required of the position. Custom physical requirement(s) can be added in the **Other** text box field.
19.6. Select the frequency for each **Mental Requirement** that is expected to routinely be required of the position. **Custom mental requirement(s)** can be added in the **Other** text box field.

19.7. For each **Environmental Requirement** that the position is expected to be exposed to mark Yes or No. **Custom Environmental Requirement(s)** can be added in the **Other** text box field.

When Yes is selected for “Drives motorized equipment”, a help message box will display to ensure that it should be marked as Yes and that other corresponding information in the job description is completed.
20. CRITICAL POSITION (NON-TEMPLATE)

20.1. NAVIGATE to the CRITICAL POSITION tab.

20.2. Professional and Support Staff (PSS) positions only: Refer to UCR Local Procedure 21: Selection and Appointment, Critical Position Questionnaire. Management and Senior Professional (MSP) positions are automatically designated as critical.

20.3. Review the Critical Position questionnaire. If answering Yes to at least one response question select the Yes radio button.

Note: If the personnel program of the job code is a Management Senior Professional (MSP), then the system will default to Yes, and will not be editable.
21. JD ATTACHMENTS (NON-TEMPLATE)

21.1. **NAVIGATE** to the **JD ATTACHMENTS** tab, or the **Next Section** button.

21.2. **Job Description Attachments** should be specifically relevant to the review and classification of the job descriptions and/or should be specifically relevant details to the employee’s classification held during the corresponding time of the job description.

Examples include, but are not limited to: Organizational Chart, Approved Waivers of Recruitment, Employment Contracts, Information relevant to the requested positions Empl Class, etc.

21.3. A current **Organizational chart** which includes the position the job description is for must be uploaded on the JD Attachments tab. After uploading the file, **SELECT “OrgChart”** from the drop-down menu. Other files specifically relevant to the job description classification action may also be uploaded on the JD Attachments tab.

When a job description is being created through either the **HRMS Recruitment** or **Review** modules documents directly related to the **Recruitment** or **Review** action should not be uploaded on the JD Attachments tab, but rather on the **Recruitment** or **Review Attachment** tab.
22. JD COMMENTS - (NON-TEMPLATE)

22.1. NAVIGATE to the JD COMMENTS tab

22.2. Job Description Comments should be details relevant to the submission, review, and classification of the job description. Note: The JD Comments tab is only available when initiating or updating a job description from the HRMS Job Builder module.

22.3. A user can add a comment by CLICKING and typing in the "Enter your comments here" text box and then CLICKING the Add Comment button. Comment(s) should provide context and/or background information about the action request for various reviewers of the action.

22.4. A user can edit only their own comment(s) by CLICKING on the pencil icon. An Edited icon displays when a comment has been edited.

22.5. A user can delete only their own comment(s) by CLICKING on the trash can icon.

22.6. NAVIGATE to the REVIEW & SUBMIT tab, or the Next Section button.
23. REVIEW & SUBMIT - (NON-TEMPLATE)

23.1. The Review & Submit tab displays a full version of all fields completed in the job description for a user's review.
23.2. **REVIEW** the full job description for any changes or updates that may be necessary before selecting a JD Action option. To edit a field, determine which tab the field is on and **navigate** to the tab by selecting the corresponding tab directly or by scrolling through each tab using the Previous Section and Next Section buttons located at top and the bottom of each tab.

**Note:** The **Review & Submit** tab will not display information from the **JD Attachments** or **JD Comments** tab.
24. HRMS JOB DESCRIPTION TAB

24.1. The **Job Description** tab contains the specific information about the position being recruited. Some of these fields are pulled from the job description page and are editable only within job builder.

24.2. Once you have completed the Job Description in the Job Builder, click on the **Review and Submit** tab of the Job Description. Then, click one of the **Return to Recruitment** buttons, located at the top and the bottom of the page.

24.3. After clicking on the **Return to Recruitment** button, you will be taken back to the **Recruitment** to complete the information on other tabs.
24.4. The **Required Fields Banner** indicates all items that require attention.

Click the + icon to expand the Required Fields Banner.

Click **Cancel Recruitment** to cancel recruitment. Once cancelled, it cannot be retrieved.
24.5. Review the items by **CLICKING** on *Click to Expand.* *(Note: When a required action is satisfied it no longer displays in the **Required Fields Banner**.)*

24.6. Each section of the **Recruitment** may be accessed by either **CLICKING** directly on the tab on the left-hand side or using the **Next Section** button, found at the top and bottom of each page.
24.7. Use the **Edit Job Description** button in the HRMS Job Description tab to make updates to the job description.
25. RECRUITMENT PROFILE TAB

25.1. The Recruitment Profile tab contains the specific information about the position being recruited. Some of these fields are pulled from the job description page and are editable only within job builder.

Note: The Job Code Description displays the basic information that is brought over from Job Builder.
25.2. **CLICK** on the *Recruitment Profile* tab.

25.3. **ENTER the Position Number.** Note: Department Coordinator will need to retrieve the position number prior to starting the recruitment process in HRMS.

25.4. **CLICK** in the *Work Schedule* field, and choose one of the work schedules. **Note:** A work schedule can be manually added.

25.5. **CLICK** in the *Employee Classification* field to select an employment type.

   a) Contract – Hired for a specific project/time
   b) Career – Full-time opportunity
   c) Limited – Short-term up to 1000 hours
   d) Per Diem – Occasional work
   e) Partial Year – Full-time but only work partial year (9, 10, or 11-months of the school year)

25.6. **CLICK** in the *Recruitment Contact NetId* field. 
**Note:** Put the ID of the individual who is handling the recruitment process.
25.7. **CLICK** in the *Number of Openings* field to add the number of positions available for this recruitment.

25.8. **CLICK** in the *Required Travel* field to select the amount of travel necessary for this position.

25.9. **CLICK** in the *Working Site* field to select the site where this position will work.

25.10. **CLICK** in the *Working Building* field to select the building where the position will work. **Note:** The options that are shown correspond with the site selected.
25.11. **CLICK** in the *Internal Only Recruitment* field to select the recruitment type.
   a) No – Internal and external
   b) UC System- Internal for UC employees
   c) UCR- Internal to only UCR employees
   d) ORG Only- Internal to the organization only

25.12. **CLICK** in the *Salary Range* field to enter the budgeted hiring range.

25.13. **CLICK** in the *Advertised/Posted Hiring range* fields to select the minimum and maximum.

   **Note:** The Talent Acquisition Department requires that the full range be posted for all represented positions. Therefore, the posted hiring range cannot be changed from **Minimum to Maximum**. This is a union guideline for most of the contracts. Non-represented positions have the option to adjust the range.

25.14. **CLICK** in the *Position Type* field to select if the position is full or part-time.

   **Note:** For part-time work, also add the percentage of time the position will work. If a percentage of time is not selected, the task will not clear from the *Required Fields Banner*. 
25.15. **CLICK** in the *Selection Process* field to answer the two questions. **Note:** When answering “No” to the questions, the task is removed from the *Required Fields Banner*. If “Yes” is answered the *Required Fields Banner* will notify you that an assessment type and/or employee/job code are needed.

![Selection Process](image)

25.16. **CLICK** in the *Posted Position Purpose* field to type a position purpose. **Note:** The description should contain information about the position and some marketing information; on this section there is a 4000-character limit.

![Posted Position Purpose](image)

25.17. **CLICK** in the *Search Committee* field to add the name and role of the committee members. **Note:** Search committees require a Chair, Chair’s Associate, Affirmative Action Compliance Liaison, and a Member. **Note:** This is not a required field.

![Search Committee](image)
26. RECRUITMENT PLAN TAB

26.1. The Recruitment Plan tab contains key pieces of information about the recruitment including the posting period and the proposed recruitment plan for this position. In addition, this tab also contains Affirmative Action Placement Goals to assist with developing the recruitment plan.

26.2. CLICK on the Recruitment Plan tab.

26.3. CLICK in the Posting Period field to selection the posting period. **Note:** Continuous recruitment is for when multiple people are hired into the role.
26.4. **Placement Goals** – This information outlines specific goals for the recruitment plan that adhere to the UCR Affirmative Action goals. These goals are important to understand as they drive your advertising efforts to groups current underrepresented.

26.5. **CHECK** the “I need help in identifying sources and wish to be contacted” box when needing assistance from Talent Acquisition with determining other places to post the job outside of the traditional UCR job board and all other job boards.

26.6. **CLICK** in the open field to type **Additional Advertising Resources** where the job will be posted.

26.7. **CLICK** in the open field to add **Other Recruitment Details** surrounding the overall recruitment plan.
27. RECRUITMENT ATTACHMENTS

27.1. **CLICK** on the *Recruitment Attachments* tab.

27.2. **CLICK** on *Drop Files to Upload* to add any files related to the recruitment. **Note:** If a file is incorrectly attached, delete it and attach a different document.
28. RECRUITMENT COMMENTS

28.1. CLICK on the Recruitment Comments tab.

28.2. CLICK in the Recruitment Comments field to add comments related to the classification of this recruitment.
29.1. **CLICK** on the *Review and Submit* tab. From here you can review the *HRMS Job Description*, the *Recruitment Profile*, and the *Recruitment Plan* tabs.
a) **CLICK** on the + icon to review the *HRMS Job Description*.

b) **CLICK** on the + icon to review the *Recruitment Profile*.
29.2. From the drop-down menu SELECT the **Submit to Org Coordinator** option.

29.3. This action routes the Recruitment to the **Org HR Coordinator's** WIP queue.

29.4. After you select **Submit to Org HR Coordinator** please add comments in the pop-up box.

29.5. Once the Recruitment is successfully submitted, the status bar will update.
CLICK on the Submit to Org HR Coordinator field to input a comment.
30. CHECKING OUT THE RECRUITMENT

30.1. The **Checkout Recruitment** option allows a Work In Progress (WIP) Recruitment to become accessible to any Faculty/Staff member with an active UCR NetID. Depending on the Checkout Role selected, the reviewer will be able to view, edit, and approve the recruitment.

30.2. From the drop-down menu the **Department Coordinator** can select the **Checkout Recruitment** option.

**Note:** Department Coordinators will not see this option unless they are also Org Coordinators.

Click the + icon to expand the Required Fields Banner.
30.3. **INPUT** the NetID information for the person to whom the Recruitment is being checked out to. From the **Check Out Option** drop-down menu select the approval type (see below for detailed explanation).

![Check Out Option Menu](image1)

- a. Approval Required (Read-Only) – Requires approval **without** the option of making edits.
- b. Approval Required (Red-Write) – Requires approval **with** the option of making edits.
- c. No Approval Required (Read-Only) – No approval necessary just needs reviewing
- d. No Approval Required (Read-Write) – No approval necessary but has edit capabilities

### Illustration:

- Hoovering over the box icons that appear above the queue/status line will display the check-out history summary.

#### Notes:

- a. Approval Required (Read-Only) – Requires approval **without** the option of making edits.
- b. Approval Required (Red-Write) – Requires approval **with** the option of making edits.
- c. No Approval Required (Read-Only) – No approval necessary just needs reviewing
- d. No Approval Required (Read-Write) – No approval necessary but has edit capabilities

30.4. **Note:** The person who checks out a recruitment can go back to the **Recruitment Action Options** and close the checkout.

![Close Check Out](image2)

Sam will be on vacation for two weeks.
Organizational HR Coordinator Role

The Org HR Coordinator is responsible for ensuring the job description is appropriate based on organizational standards. The Organizational HR Coordinator may update or edit any unlocked fields of the job description.

31. GETTING STARTED – WIP RECRUITMENT PROCEDURE

31.1. CLICK on the Recruitment tile.

31.2. CLICK on the WIP Recruitment tile.
31.3. Identify the recruitment to review, then **CLICK** on the **pencil** icon to open the job description.
Click the + icon to expand the Required Fields Banner.

Click History to track the history of the recruitment.
31.4. The Organizational HR Coordinator will review both the Job Description and the Recruitment to make updates. All Org Coordinators are able to edit the recruitments. Note: The arrows denote the options for accessing the Job Description and the Recruitment.

31.5. Once the HR Coordinator reviews both the Job Description and the Recruitment for accuracy, they can move it to the next phase.

31.6. CLICK on the Recruitment Action Options button. Note: Organizational Coordinators can choose to Check Out Recruitment, Return to Dept HR Coordinator, or Submit to HR Classification Analyst.

31.7. From the drop-down menu select the Check Out Recruitment.
31.8. **INPUT** the NetID information for the person to whom the Recruitment is being checked out. From the **Check Out Option** drop-down menu select the approval type (see below for detailed explanation).

![Check Out Option](image1)

- a) Approval Required (Read-Only) – Requires approval **without** the option of making edits.
- b) Approval Required (Red-Write) – Requires approval **with** the option of making edits.
- c) No Approval Required (Read-Only) – No approval necessary just needs reviewing
- d) No Approval Required (Read-Write) – No approval necessary but has edit capabilities

31.9. **Note**: The person who checks out a recruitment can go back to the **Recruitment Actions Options** and close the checkout.

![Close Check Out](image2)

31.10. **CLICK** on the **Recruitment Action Options** button. **Note**: Organizational Coordinators can choose to **Check Out Recruitment**, **Return to Dept HR Coordinator**, or **Submit to HR Classification Analyst**.
31.11. From the drop-down menu select the *Return to Dept HR Coordinator*.

31.12. **INPUT** comments in the *Return to Dept HR Coordinator* field, then **CLICK** on the **Return to Dept HR Coordinator** button. **Note:** The white check-mark denotes the Recruitment was sent back to the **Department HR Coordinator**.
31.13. Once all the required fields have been satisfied and the Required Fields Banner does not appear above the job description, the Org HR Coordinator can submit the Recruitment to the HR Classification Analyst.

31.14. From the drop-down menu SELECT the Submit to Classification Analyst option.

31.15. Once the Recruitment is successfully submitted, the status bar will update.
### 32. Awaiting Your Review Procedure

#### 32.1. Click on the Awaiting your Review tile.

**UCR Human Resource Management System**

**Recruitment**

The Recruitment Module is UCR’s online repository of recruitment actions that have been initiated for recruitment. Based on your EACS role(s), using the Recruitment Module you may be able to initiate, edit, approve, view, and search Recruitment actions. Job posting actions are transitioned to iRecruit where recruitment and selection actions are processed.

- **WIP Recruitment**
- **All Open Recruitment**
- **Completed/Pushed to iRecruit**
- **Search Recruitments**

**Awaiting your Review**

32.1. **Click on the Awaiting your Review tile.**

**Recruitments Checked Out Awaiting Your Review**

<table>
<thead>
<tr>
<th>Recruitment ID</th>
<th>Working Title</th>
<th>Payroll Title</th>
<th>Dept Code</th>
<th>Dept Name</th>
<th>Recruiting Queue</th>
<th>Created Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>97184872</td>
<td>Administrative Assistant (June 14)</td>
<td>BLANKAST.3</td>
<td>1001094</td>
<td>VC Planning, Budget &amp; Admin</td>
<td>Organizational HR Coordinator</td>
<td>06/14/2020</td>
<td>View</td>
</tr>
</tbody>
</table>
32.2. The Organizational HR Coordinator will review both the Job Description and the Recruitment to make updates, if necessary. Note: The arrows denote the options for accessing the Job Description and the Recruitment.
32.3. Once the Organizational HR Coordinator reviews both the Job Description and the Recruitment for accuracy, they can CLICK on the Review & Submit tab to Approve Recruitment Review or Disapprove Recruitment Review.

32.4. To approve a Recruitment, CLICK on the Approve Recruitment Review option.

32.5. ADD a comment to the Approve Recruitment Review field, then CLICK the Approve Recruitment Review button.
32.6. To disapprove a Recruitment, **CLICK** on the **Disapprove Recruitment Review** option.

32.7. **ADD** a comment to the **Disapprove Recruitment Review** field, then **CLICK** on the **Disapprove Recruitment Review** button.
33. ALL OPEN RECRUITMENT PROCEDURE

33.1. **CLICK** on the *Recruitment* tile.

The Recruitment Module is UCR’s online repository of recruitment actions that have been initiated for recruitment. Based on your EACS role(s), using the Recruitment Module you may be able to initiate, edit, approve, view, and search Recruitment actions. Job posting actions are transitioned to iRecruit where recruitment and selection actions are processed.
33.2. **CLICK** on the *All Open Recruitment* tile.

33.3. **CLICK** on the *eyeball* icon to view a Recruitment in the queue.
34. **SEARCH RECRUITMENT PROCEDURE**

34.1. **CLICK** on the *Recruitment* tile

34.2. **CLICK** on the *Search Recruitments* tile.
34.3. Filter by using any of the fields shown below. **CLICK** the *Search* button to pull up a list of Recruitments.

34.4. **CLICK** on the *Launch* icon to view a Recruitment.
35. **COMPLETED/PUSHED TO iRECRUIT PROCEDURE**

35.1. **CLICK** on the *Recruitment* tile.

35.2. **CLICK** on the *Completed/Pushed to iRecruit* tile.
35.3. **CLICK** on the *eyeball* icon to view a completed Recruitment that has been pushed to iRecruit.
HR Classification Analyst

The HR Classification Analyst is responsible for ensuring the job description is classified correctly. The HR Classification Analyst ensures that job specific details align with the Human Resources Management System Job Standard and ensures consistent application across the campus.

36. REVIEWING RECRUITMENT FOR CLASSIFICATION

36.1. CLICK on the Recruitment tile.

36.2. CLICK on the WIP tile.
36.3. Identify the recruitment to review, then CLICK on the pencil icon to open the recruitment.

My WIP Recruitments

<table>
<thead>
<tr>
<th>Recruitment ID</th>
<th>Working Title</th>
<th>Posted Title</th>
<th>Dept Code</th>
<th>Dept Name</th>
<th>Routing Queue</th>
<th>Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>27259065</td>
<td>Applications Programmer 3-EP Testing</td>
<td>Applications Programmer 3</td>
<td>DI1284</td>
<td>Student Affairs Mktg &amp; Comm</td>
<td>HR Classification Analyst</td>
<td>06/30/2020</td>
<td></td>
</tr>
<tr>
<td>27052254</td>
<td>EG - Testing tracker #171708251 (custom JD)</td>
<td>FAC PROJECT MGR 3</td>
<td>D03200</td>
<td>FS Administration</td>
<td>HR Classification Analyst</td>
<td>05/02/2020</td>
<td></td>
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<tr>
<td>26932133</td>
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<td>FAC PROJECT MGR 3</td>
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<td>03/21/2020</td>
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<td>26927596</td>
<td>FAC PROJECT MGR 3</td>
<td>FAC PROJECT MGR 3</td>
<td>HR Classification Analyst</td>
<td>03/12/2020</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

36.4. The HR Classification Analyst will review both the Job Description and the Recruitment to make updates. Note: The arrows denote the options for accessing the Job Description and the Recruitment.
36.5. Once the **HR Classification Analyst** reviews both the **Job Description** and the **Recruitment** for accuracy, they can move it to the next phase. **CLICK** on the **Review and Submit** tab to move the recruitment forward to access the drop-down menu listed below:

36.6. **CLICK** on the **Recruitment Action Options** button. **Note:** **Classification Analyst** can choose to **Check Out the Recruitment**, **Return to Dept HR Coordinator**, **Return to Org HR Coordinator**, or **Classify Job Description**

36.7. From the drop-down menu select the **Check Out Recruitment**.
36.8. **INPUT** the NetID information for the person to whom the Recruitment is being checked out. From the **Check Out Option** drop-down menu select the approval type (see below for detailed explanation).

36.9. **Note:** The person who checks out the recruitment can go back to the **Recruitment Action Options.**
36.10. **CLICK** on the **Recruitment Action Options** button. 
   *Note: Classification Analyst* can choose to **Check Out the Recruitment**, **Return to Dept HR Coordinator**, **Return to Org HR Coordinator**, or **Classify Job Description**

36.11. From the drop-down menu select **Return to HR Coordinator**

36.12. **INPUT** comments for why the Recruitment is being returned, then **CLICK** **Return to Dept HR Coordinator**.

*Hoovering over the box icons that appear above the Queue/Status line will display the Checked-Out History summary.*
36.13. **CLICK** on the *Recruitment Action Options* button. 
*Note: Classification Analyst* can choose to *Check Out the Recruitment, Return to Dept HR Coordinator, Return to Org HR Coordinator,* or *Classify Job Description.*

36.14. From the drop-down menu select the *Classify Job Description.*

36.15. **INPUT** comments supporting the classification of the job description, then **CLICK** *Classify Job Description.*
37. **ALL OPEN RECRUITMENT PROCEDURE**

37.1. **CLICK** on the **Recruitment** tile.

37.2. **CLICK** on the **All Open Recruitment** tile.
37.3. **CLICK** on the *eyeball* icon to view a Recruitment.

---

All Open Recruitments

<table>
<thead>
<tr>
<th>Recruitment ID</th>
<th>Working Title</th>
<th>Payroll Title</th>
<th>Dept Code</th>
<th>Dept Name</th>
<th>Routing Queue</th>
<th>Created Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>27255691</td>
<td>Applications Programmer 3-EP Testing</td>
<td>Applications Programmer 3</td>
<td>D01284</td>
<td>Student Affairs Mktng &amp; Comm</td>
<td>Department HR Coordinator</td>
<td>06/28/2020</td>
<td>View</td>
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<td>27253886</td>
<td>Applications Programmer 3</td>
<td>Applications Programmer 3</td>
<td>D01292</td>
<td>Student Affairs Info Systems</td>
<td>Department HR Coordinator</td>
<td>06/29/2020</td>
<td>View</td>
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<td>27252964</td>
<td>Applications Programmer 3</td>
<td>Applications Programmer 3</td>
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<td>27252114</td>
<td>Applications Programmer 3</td>
<td>Applications Programmer 3</td>
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<td>27240049</td>
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<td>Applications Programmer 3</td>
<td>D01292</td>
<td></td>
<td>Department HR Coordinator</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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**FINANCIAL ANL SUPV 1**

**HRMS Job Description**

**General Information**

- **Job Title:** Manager, Financial Analysis
- **Department:** Student Affairs
- **Supervisor:** Director, Student Affairs

**Position Type:** Full-Time

---

**Generic Scope**

Provides overall supervision to unit or group of employees. Required to determine how best to use resources to meet the needs of the unit. Requires the ability to plan and coordinate activities of the unit to ensure compliance with departmental and organizational policies, procedures, and guidelines. Ensures accountability and stewardship of department resources, including budget, financial, and human resources in compliance with departmental standards and procedures.
38. COMPLETED/PUSHED TO iRECRUIT PROCEDURE

38.1. CLICK on the Recruitment tile.

38.2. CLICK on the Completed/Pushed to iRecruit tile.
38.3. **CLICK** on the **eyeball** icon to view a Recruitment.
39. SEARCH RECRUITMENT PROCEDURE

39.1. CLICK on the Recruitment tile

39.2. CLICK on the Search Recruitment tile.
39.3. Filter by using any of the fields shown below and then **CLICK Search**.

39.4. **CLICK** on the **Launch** icon to view a Recruitment.
HR Recruitment Analyst

The HR Recruitment Analyst is responsible for reviewing and coordinating recruitment plans and posting the recruitments. The HR Recruitment Analyst may update or edit fields within the recruitment only, and is unable to edit fields within the Job Description.

40. REVIEWING RECRUITMENT FOR POSTING

40.1. CLICK on the Recruitment tile.

40.2. CLICK on the WIP Recruitment tile.
40.3. Identify the recruitment to review, then **CLICK** on the *pencil* icon to open the recruitment.

<table>
<thead>
<tr>
<th>Recruitment ID</th>
<th>Working Title</th>
<th>Payroll Title</th>
<th>Dept Code</th>
<th>Dept Name</th>
<th>Routing Queue</th>
<th>Created Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>26907534</td>
<td></td>
<td>FAC PROJECT MGR</td>
<td>3</td>
<td></td>
<td>HR Classification Analyst</td>
<td>02/25/2020</td>
</tr>
<tr>
<td>26909618</td>
<td>Testing Title</td>
<td>FAC PROJECT MGR</td>
<td>3</td>
<td>D01205</td>
<td>HR Classification Analyst</td>
<td>02/25/2020</td>
</tr>
<tr>
<td>26910000</td>
<td></td>
<td>FAC PROJECT MGR</td>
<td>3</td>
<td></td>
<td>HR Classification Analyst</td>
<td>02/25/2020</td>
</tr>
</tbody>
</table>

40.4. The **HR Recruitment Analyst** will be able to review the recruitment and make updates as necessary. The HR Recruitment Analyst is unable to edit the job description. After job is classified, only the **Classification Analyst** is able to edit the job description.

**Click** the + icon to expand the *Required Fields Banner.*

**Click History** to track the history of the recruitment.
40.5. **CLICK** on the **Recruitment Analyst** tab to complete the required fields.
40.6. **CLICK** in the *Posting Date* field to add the date the recruitment will be posted. **Note:** Alternatively, the calendar icon can be selected to add the date.

40.7. The *Posting Closed Date* field will default to *Not Applicable* unless *Required Recruitment Period (10 business days)* is selected in the Recruitment Plan tab. **Note:** When *Required Recruitment Period (10 business days)* is selected in the Recruitment Plan tab, the system will automatically add a *Posting Closed Date* in the field.

40.8. **CLICK** on the arrow in the *Category* field to select a posting category from the dropdown list.

40.9. **CLICK** in the box to approve the proposed advertising plan.
40.10. REVIEW the information in the *Posted Minimum Requirement* field. **Note:** This information is pulling from the Job Builder. On this section there is a 4000-character limit.

![Posted Minimum Requirement]

Has ability to independently gather required information, organize, and perform financial analysis assignments. Thorough knowledge and understanding of internal control practices and their impact on protecting University resources. Proven interpersonal skills with peers throughout the organization.

3260 characters remaining

40.11. REVIEW the information in the *Posted Preferred Qualification* field. **Note:** This information is pulling from the Job Builder.

![Posted Preferred Qualification]

Thorough knowledge of finance policies, practices and systems.

3837 characters remaining
40.12. **REVIEW** the information in the **Additional Information** field. **Note:** This information is auto-populated.

Additional Information

In the Heart of Inland Southern California, UCR Riverside is located on nearly 1,200 acres near Box Springs Mountain in Southern California; the park-like campus provides convenient access to the vibrant and growing Inland region. The campus is a living laboratory for the exploration of issues critical to growing communities’ air, water, energy, transportation, politics, the arts, history, and culture. UCR gives every student, faculty and staff member the resources to explore, engage, imagine and excel.

UC Riverside is recognized as one of the most ethnically diverse research universities in the country boasting several key rankings of which we are extremely proud.

<dl>
  <dt>UC Riverside was included in the (August 2018) edition of The Princeton Review’s “The Best 382 Colleges.”</dt>
  <dd>Shanghai Jiao Tong University (August 2017) Academic Ranking of World Universities ranked UC Riverside among the top 151 institutions. This survey bills itself as “the most trustworthy precursor of global rankings of the world’s top 500 universities.”</dd>
  <dt>In 2016, UCR was recognized for graduation rate success by the Association of Public and Land-Grant Universities (APLU) for achieving near parity across racial-ethnic, socio-economic, and gender boundaries.</dt>
  <dd>UCR ranks among the Top 15 Public Research Universities in the nation, as identified by the 2017 Washington Monthly.</dd>
  <dt>In 2017, two separate reports from the Education Trust celebrated UCR as a national leader for African American and Latino student success. UCR was one of just three schools to be named top-performing institutions in both reports and the only California campus recognized among 18 top-performing colleges and universities in the nation for high black student graduation rates.</dt>
</dl>

The University of California is an Equal Opportunity/Affirmative Action Employer with a strong institutional commitment to the achievement of excellence and diversity among its faculty and staff. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, protected veteran status, or any other characteristic protected by law.

For information about our generous employee benefits package, visit: [Employee Benefits Overview](http://ucnet.universityofcalifornia.edu/compensation-and-benefits)

---

1559 characters remaining

40.13. **TYPE** N/A in the **Advertising Plan-Job Target** field.

Advertising Plan - Job Target

N/A

3997 characters remaining
41. REVIEW AND SUBMIT

41.1. CLICK on the Review and Submit tab

41.2. LICK on the Recruitment Action Options button. Note: HR Recruitment Analyst can choose to Check Out the Recruitment, Return to Dept HR Coordinator, Return to Org HR Coordinator, or Post to Jobs.
41.3. From the drop-down menu select the **Check Out Recruitment**.

41.4. **INPUT** the NetID information for the person to whom the Recruitment is being checked out. From the **Check Out Option** drop-down menu select the approval type (see below for detailed explanation).

41.5. **Note**: The person who checks out a recruitment can go back to the **Recruitment Action Options** and close the checkout.
41.6. **CLICK** on the *Recruitment Action Options* button. **Note:** Recruitment Analyst can choose to *Check Out Recruitment*, *Return to Dept HR Coordinator*, *Return to HR Org HR Coordinator*, or *Post to Jobs*.

41.7. From the drop-down menu select the *Return to Dept HR Coordinator* option.

41.8. **INPUT** comments for why the Recruitment is being returned, then **CLICK** *Return to Dept HR Coordinator*.

41.9. **CLICK** on the *Recruitment Action Options* button. **Note:** Recruitment Analyst can choose to *Check Out Recruitment*, *Return to Dept HR Coordinator*, *Return to HR Org HR Coordinator*, or *Post to Jobs*. 
41.10. From the drop-down menu select the Return to Org HR Coordinator option.

41.11. **INPUT** comments for why the Recruitment is being returned, then **CLICK** Return to Org HR Coordinator.

41.12. **CLICK** on the Recruitment Action Options button. **Note**: Recruitment Analyst can choose to Check Out Recruitment, Return to Org HR Coordinator, or Post to Jobs.

41.13. From the drop-down menu select the **Post To Jobs** option.
41.14. **INPUT** comments then **CLICK Post to Jobs**

**Post to Jobs**

[Image of Post to Jobs screen with comments field and 'Post to Jobs' and 'Close' buttons]

**Success**

Post to Jobs Successfully

[Image of success message]

**Process Progress**

- Department HR Coordinator
- Organizational HR Coordinator
- HR Classification Analyst
- HR Recruitment Analyst
- Search Committee
- Affirmative Action Analyst
- Finalized

[Image of process progress bar]
42. ALL OPEN RECRUITMENT PROCEDURE

Welcome ______________________

Welcome to the UCR Human Resources Management System (HRMS). The HRMS is a UCR developed Staff HR Software Application containing the following modules: Job Code Information, Job Builder, Recruitment, and Review. The Job Builder, Recruitment, and Review modules are only visible to you if you have a corresponding EACS role. Mouse over each module tile for a brief description.

42.1. CLICK on the Recruitment tile.

Recruitment

The Recruitment Module is UCR’s online repository of recruitment actions that have been initiated for recruitment. Based on your EACS role(s), using the Recruitment Module you may be able to initiate, edit, approve, view, and search Recruitment actions. Job posting actions are transitioned to iRecruit where recruitment and selection actions are processed.

42.2. CLICK on the All Open Recruitment tile.
42.3. **CLICK** on the *eyeball* icon to view a Recruitment.

---

**All Open Recruitments**

<table>
<thead>
<tr>
<th>Recruitment ID</th>
<th>Working Title</th>
<th>Payroll Title</th>
<th>Dept Code</th>
<th>Dept Name</th>
<th>Routing Queue</th>
<th>Created Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>27255691</td>
<td>Applications Programmer 3-EP Testing</td>
<td>Applications Programmer 3</td>
<td>D01284</td>
<td>Student Affairs Mktn &amp; Comm</td>
<td>Department HR Coordinator</td>
<td>06/30/2020</td>
<td><img src="1" alt="View" /></td>
</tr>
<tr>
<td>27253886</td>
<td>Applications Programmer 3</td>
<td>Applications Programmer 3</td>
<td>D01292</td>
<td>Student Affairs Info Systems</td>
<td>Department HR Coordinator</td>
<td>06/29/2020</td>
<td><img src="1" alt="View" /></td>
</tr>
<tr>
<td>27252364</td>
<td>Applications Programmer 3</td>
<td>Applications Programmer 3</td>
<td>Department HR Coordinator</td>
<td><img src="42.3" alt="Click" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27252114</td>
<td>Applications Programmer 3</td>
<td>Applications Programmer 3</td>
<td>Department HR Coordinator</td>
<td><img src="42.3" alt="Click" /></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27240049</td>
<td>Applications Programmer 3-EP Testing</td>
<td>Applications Programmer 3</td>
<td>D01292</td>
<td>Student Affairs Info Systems</td>
<td>Department HR Coordinator</td>
<td>06/23/2020</td>
<td><img src="1" alt="View" /></td>
</tr>
</tbody>
</table>

---

**FINANCIAL ANL SUPV 1**

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**42.3. Click on the eyeball icon to view a Recruitment.**

---

**Back To TOC**
43. COMPLETED/PUSHED TO iRECRUIT

43.1. CLICK on the Recruitment tile.

43.2. CLICK on the Completed/Pushed to iRecruit tile.
### Completed/Posted to TAM/Pushed to iRecruit

<table>
<thead>
<tr>
<th>Recruitment ID</th>
<th>Working Title</th>
<th>Payroll Title</th>
<th>Dept Code</th>
<th>Dept Name</th>
<th>Routing Queue</th>
<th>Created Date</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>27306950</td>
<td>Blank Assistant test (July 15) for AA</td>
<td>BLANK AST 3</td>
<td>D01122</td>
<td>Environmental Health &amp; Safety</td>
<td>Pushed To iRecruit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>27263934</td>
<td>Administrative Assistant - July 2 test</td>
<td>BLANK AST 3</td>
<td>D01094</td>
<td>VC Planning, Budget &amp; Admin</td>
<td>Pushed To iRecruit</td>
<td>07/02/2020</td>
<td></td>
</tr>
<tr>
<td>27184872</td>
<td>Administrative Assistant (June 14)</td>
<td>BLANK AST 3</td>
<td>D01094</td>
<td>VC Planning, Budget &amp; Admin</td>
<td>Pushed To iRecruit</td>
<td>06/14/2020</td>
<td></td>
</tr>
<tr>
<td>27183166</td>
<td>EG - Test June 10 (unlocked template)</td>
<td>HR MGR 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27180646</td>
<td>EG - Testing on Jun 10 2020</td>
<td>BLANK AST 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

43.3. **CLICK** on the *eyeball* icon to view a Recruitment.
44. SEARCH RECRUITMENTS

44.1. CLICK on the Recruitment tile.

Recruitment

The Recruitment Module is UCR’s online repository of recruitment actions that have been initiated for recruitment. Based on your EACS role(s), using the Recruitment Module you may be able to initiate, edit, approve, view, and search Recruitment actions. Job posting actions are transitioned to iRecruit where recruitment and selection actions are processed.

44.2. CLICK on the Search Recruitments tile.
44.3. Filter by using any of the fields shown below and then CLICK Search.

44.4. CLICK on the Launch icon to view a Recruitment.
45. Recruitment Analyst – Posting a Recruitment

45.1. **CLICK** the *WIP Recruitments* tile

![Image of HRMS ATS interface with tiles for various recruitment statuses]

45.2. **CLICK** the **View button** link under the **Actions** column for the recruitment you want to open.

![Image of My WIP Recruitments table with recruited positions listed]
45.3. The recruitment opens to the HRMS Job Description tab. Scroll down to review the entire job description. **Note:** Screen is read only.
45.4. **CLICK** the *Recruitment Profile* tab to review the information. All tabs are editable by the Recruitment Analyst role only.
**Add any Standard Language to the "Posted Position Purpose" as needed. Standard Language may include verbiage pertaining to Pay Scale, Internal Recruitments, Visa, and Covid policy.**

**Note:** Chair’s Associates are identified by their Org as a default Chair’s Associate. They appear on all recruitments for all of their organizations. Organizations can also choose default Chair’s Associates for a specific department.
45.5. **CLICK** the *Recruitment Plan* tab to review the information.

**Follow-up with Department, as necessary, regarding assistance with advertising.**
45.6. **CLICK** the *Recruitment Comments* tab to add or review comments

1. To add a comment, **CLICK** in the comments box.
2. **CLICK** *Add Comment.*
45.7. **CLICK** the *Recruitment Attachments* tab to add documents pertaining to the recruitment.

1. To add an attachment, **DROP** a document into the document field box or, **CLICK** to select a document to upload.
2. **SELECT** a document from your computer files, and click **Open**.
3. Attachment will be listed under the *Uploaded Attachments* section.
45.8. **CLICK** the *Recruitment Analyst* tab

1. **CLICK** on the *Posting Date* field to bring up the calendar. **SELECT** today’s date (or future day if you will be posting it at a later date).

2. **CLICK** on *Posting Closed* date filed only if “Not Applicable” is NOT in the field.

3. **SELECT** a *Posting Category* from the drop-down menu. **SELECT** the category that best describes the position.

4. The *Recruitment Period Start Date* and *Recruitment Period End* will auto-populate based on the *Posting Date* field.

5. **CHECK** the box next to “Approval of the proposed advertising plan…”

6. In the field “*Advertising Plan – Job Target*”, type N/A.
Posted Preferred Qualification

Demonstrated ability to collect, analyze, and assess data related to student success, student learning outcomes, and program effectiveness. Demonstrated understanding of student development theories and practices. Significantly and increasing experience in transitional programs for transferees, second years, first-generation, international students. Demonstrated knowledge of best practices regarding students in transition. Advanced knowledge of common University-specific computer application programs and knowledge of University and departmental principles and procedures involved in risk assessment and evaluating risks as to likelihood and consequences.

Additional Information

In the Heart of inland Southern California, UC Riverside is located on nearly 1,200 acres near Box Springs Mountain in Southern California, the park-like campus provides convenient access to the vibrant and growing inland region. The campus is a living laboratory for the exploration of issues critical to growing communities’ air, water, energy, transportation, politics, the arts, history, and culture. UCR offers every student, faculty and staff member the resources to explore, engage, imagine and excel.

UC Riverside is recognized as one of the most ethnically diverse research universities in the country boasting several key rankings of which we are extremely proud. 

- UC Riverside is proud to be ranked No. 12 among all U.S. universities, according to Money Magazine’s 2020 rankings, and among the top 1 percent of universities worldwide, according to the 2018-20 Center for World University Rankings.
- UC Riverside is the top university in the United States for social mobility. - U.S. News 2020
- UC is a member of the University Innovation Alliance, the leading national coalition of public research universities committed to improving student success for low-income, first-generation, and students of color.
- Among top-tier universities, UC Riverside ranks No. 2 in financial aid. - Business Insider 2019
- Ranked No. 2 in the world for research. UCR’s Department of Entomology maintains one of the largest collections of insect specimens in the nation. - Center for World University Rankings
- UCR’s distinguished faculty boasts 2 Nobel Laureates, and 13 members of the National Academies of Science and Medicine.

The University of California is an Equal Opportunity/Affirmative Action Employer with a strong institutional commitment to the achievement of excellence and diversity among its faculty and staff. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, age, disability, protected veteran status, or any other characteristic protected by law.

For information about our generous employee benefits package, visit: [Employee Benefits](https://www.ucr.edu/ucrhumanresources/compensation-and-benefits/

Overview

Advertising Plan - Job Target
45.9. **CLICK** the *Review & Submit* tab to review the information. In the “**Recruitment Actions Options**” menu on the top right corner, select “Post to Jobs”.

**Note:** Once the Recruitment Analysts posts the recruitment, it takes 30 minutes to an hour to show up on the job site.
46. Search Committee

46.1. Once the position has been posted by the Recruitment Analyst, applications can be viewed under **Review Application Pools**. The review applicant interface feature in HRMS is designed to be flexible to accommodate search committee procedures as established by organizational units/departments. The interface of the application review system varies based on the role held by the user. There are four roles within the Application Review System: **Search Committee Chair, Chair’s Associate, Search Committee Member, and Affirmative Action Liaison**. Before establishing roles, you may want to determine the following: individuals who will actively manage the search, who will screen the candidates, and who will make final decisions related to applicants invited for interviews.

46.2. Search Committee is made up of the:

1. **Committee Chair** – Adds or removes members from the search committee; sees all comments made about candidates; has authority to limit the candidate pool to “Meets Minimum Requirements” applicants for member viewing; enters selection codes for every candidate; chooses candidates for interviews; selects final candidate; and forwards to the Departmental HR Coordinator.
2. **Chair’s Associate** – Same authorities as the Committee Chair.
3. **Member** – Ability to view and screen candidates (if prescreening has not been done by the Chair or Chair’s Associate); provide comments on candidates; make recommendations on candidates.
4. **Affirmative Action Liaison** - Assigned by the Search Committee with the status and authority to ensure all aspects of the recruitment process are fair and unbiased and in compliance with Affirmative Action and Equal Opportunity laws.
46.3. Adding a Search Committee Member to the Recruitment: The Chair or Chair’s Associate can add additional Search Committee Members to a recruitment.

1. CLICK on Review Application Pools
2. CLICK on the View button for the recruitment
3. CLICK on the Search Committee tab
4. CLICK the Committee NetID field to search for the committee member’s name and select the appropriate role from the drop-down menu
5. CLICK ADD
47. Application Review

47.1. This tab allows the Search Committee to view the candidate pool. The Search Committee may view and filter prospective applicants. Search Committee Members may make recommendations on the candidates. The Chair/Chair’s Associate may disposition candidates as to whether they meet or do not meet the minimum requirements, as well as label interview information. Candidates who do not meet minimum requirements by the Chair/Chair’s Associate will automatically be removed from consideration status. This means all Search Committee members will not be able to view the applications for those candidates. If a user would like to view a specific application again, they may filter the results of the application pool by using the links above the candidates’ information. Selecting Show All will show all candidates not just those Under Consideration. Once the committee has selected a candidate they wish to hire, that person must be marked: Best Qualified- Selected for Hire to move on to final action.
Note: All applicants must have a decision code selected to route the recruitment to the Departmental HR Coordinator. The Search Committee Members role will have a different view of this page. They may view and filter all candidates in the applicant pool, mark if they recommend the candidate and leave comments on the individual candidates.
47.2. Reviewing Applications

1. CLICK on **Review Application Pools**
2. CLICK on the **View button** for the recruitment
3. CLICK on the **Application Review** tab
4. CLICK on the candidate’s name to bring up their application details
5. Scroll through the screen to view the application and CLICK on the **Resume, Cover Letter** and **Other Documents** to view the attachments (if provided)

6. CLICK “Generate Application Packet” to generate a PDF of the candidate’s application, cover letter (if provided) and résumé (if provided) combined into one file. The PDFs can be printed or otherwise provided to committee members who lack access to HRMS
47.3. **Applicants vs. Expressions of Interest** - An applicant is one who applies within the recruitment period. The recruitment period is ten (10) business days for positions which are Professional Support Staff level, and fifteen (15) business days for positions that are Management/Senior Professional level. Any candidates who apply after the recruitment period has ended, is put into a pool called, **Expressions of Interest**. If there are **Expressions of Interest** for your recruitment, an additional link will appear at the top of the **Application Review** tab. To view expressions of interest, the entire pool must be pulled into the existing list of candidates, must be considered, and marked as a candidate. Before a recruitment can be closed, all candidates must be categorized as either **does meet** or **does not meet** minimum requirements. Anyone who meets minimum requirements must be interviewed or have a decision code selected.

47.4. **Downloading Expressions of Interest**

1. **CLICK** on **Three Dot** menu and select the option **Download Expressions of Interest**
   A pop-up window appears confirming you have successfully downloaded all applicants expressing interest in this recruitment.

2. **CLICK OK**, all of the candidates in the **Expressions of Interest pool** will be now visible and available for your review.
47.5. How to Disposition Candidates

1. From the Application Review tab, locate the name(s) of the candidate(s) whose application you have reviewed.
2. In the Meets Minimum Requirement column, select No for candidates who do not meet the minimum requirements of the position. The candidate’s name will then be removed from view. If a candidate does meet the minimum requirements of the position, select Yes in the Meets Minimum Requirement column.

47.6. Selecting Candidates for Interview

1. From the Application Review tab, locate the name(s) of the candidate(s) who meet the minimum requirements of the position.
2. In the Interview? column, select Yes for the candidates who will be invited to interview with the Search Committee and select No for those who will not be invited for an interview.
47.7. Submitting a Short List for Affirmative Action Review - A short list consists of those applicants who have been selected to interview with the Search Committee. Once the short list of applicants has been identified, the short list needs to be submitted to Affirmative Action for review.

1. After selecting candidates who will be invited for an interview with the Search Committee, go to the Review and Submit tab.

2. From the Review and Submit tab, go to the “Recruitment Actions Options” menu on the top right. Select “Route to Affirmative Action Analyst for Short List Review” from the drop-down menu.

3. A pop-up will display the names of the candidates which have been selected for an interview, asking you to confirm your selection. CLICK OK to submit the short list for review.

4. A pop-up message will confirm that your Short List has been successfully submitted. Click OK to close the pop-up message.
Route to Affirmative Action for Short List Review?

Applicants selected for interview:
- Nikola Tesla
- Oscar Martinez
- Austin Barnes

Success
Route to Affirmative Action Analyst for Short List Review Successfully

OK
47.8. Once the short list has been submitted to Affirmative Action, the Application Review tab is frozen so that changes cannot be made to the short list. When the short list is reviewed by Affirmative Action, the Search Committee will receive an email, indicating whether the short list has been approved or declined. If your short list is approved, you can move forward with scheduling interviews. If your short list is declined, you will need to follow up with Affirmative Action to understand the reason it was declined and to determine next steps.
47.9. Dispositioning Candidates After the Interviews

1. From the **Application Review** tab, locate the name(s) of the candidate(s) who were interviewed. **Select** the appropriate **Interview Status** from the selections in the drop-down menu and enter the **Interview Date**.

2. **Select a Decision Code** for each candidate by clicking the **Make Selection** link
   a. A pop-up box will display a selection of **Applicant Decision Codes**. **Select** the most appropriate code for candidates who are not selected to move forward in the process.
   b. **Select “Best Qualified – selected for hire”** for the candidate to whom an offer will be extended.

3. **CLICK Save** at the bottom of the screen
Select applicant's disposition

- Does not meet minimum qualifications
- Incomplete application
- Not Eligible to work in the U.S.
- Candidate - Failed to respond to messages
- Candidate Withdrawal
- Not best qualified - Experience relevance and/or amount
- Not best qualified - Education
- Not best qualified - Job specific knowledge and skills
- Not best qualified - Falsified application/information
- Not best qualified - Not able to confirm qualifications in interview
- No Show/Cancel for Interview
- Best Qualified - Selected for Hire
- Qualified - Alternate Choice
- Reference check unsatisfactory or Incomplete
- Finalist declined offer
- Does Not Meet Pre-Employment Screening
- Unable to obtain government work authorization
- Failed to show/call for work
- Duplicate Application
- Lacks Priority Under Union Contract

Recruitment to be dismissed due to lack of funding or similar reason

Saving with this decision code will change the disposition for ALL APPLICANTS!
48. Affirmative Action Statistics

48.1. Affirmative Action Statistics and Total Pool Statistics can be reviewed in the Application Review tab. CLICK the 3-dot menu then select each link to view the information.

48.2. Total Pool Statistics will show you the demographics of the entire pool for the recruitment.

Note: These statistics will only be visible if you have at minimum, 5 applicants who meet the minimum qualifications.
48.3. Clicking the **Affirmative Action Statistics** link will display the placement goals for the job code. This information outlines specific goals for the recruitment plan that adhere to the UCR Affirmative Action goals. These goals are important to understand as they drive your advertising efforts to groups currently underrepresented. Your recruitment plan should include appropriate outreach and positive recruitment activities that are designed to target the categories identified in the placement goals table. **Yes** will be displayed if there is a placement goal for the selected job code. If there is no placement goal, the category will be blank. Also displayed are the Individuals with Disabilities (IWD) Utilization Goal as well as the Veteran Hiring Benchmark.

![Affirmative Action Statistics Table](image)

48.4. The link will also display the **Applicant Pool Statistics**, which are the demographics for those candidates who meet the minimum qualifications.

![Applicant Pool Statistics Table](image)
48.5. **Applicant Pool/Availability Comparisons** are also displayed through this link. This table will display if target groups are above or below availability. For those areas which are marked as **Below Availability**, additional diversity outreach should be conducted to reach those target groups.

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Applicants</th>
<th>Appl. Pool %</th>
<th>Availability %</th>
<th>Difference between Appl. Pool % and Availability %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minority</td>
<td>7</td>
<td>100.0 %</td>
<td>60.2 %</td>
<td>39.8 % Above Availability</td>
</tr>
<tr>
<td>White</td>
<td>0</td>
<td>0.0 %</td>
<td>29.8 %</td>
<td>-29.8 % Below Availability</td>
</tr>
<tr>
<td>Black or African American</td>
<td>1</td>
<td>14.3 %</td>
<td>7.0 %</td>
<td>7.3 % Above Availability</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>3</td>
<td>42.9 %</td>
<td>35.3 %</td>
<td>7.6 % Above Availability</td>
</tr>
<tr>
<td>Asian or Native Hawaiian or Pacific Islander</td>
<td>2</td>
<td>42.9 %</td>
<td>15.0 %</td>
<td>27.9 % Above Availability</td>
</tr>
<tr>
<td>Native American or Alaska Native</td>
<td>0</td>
<td>0.0 %</td>
<td>0.2 %</td>
<td>-0.2 % Below Availability</td>
</tr>
<tr>
<td>Unknown</td>
<td>0</td>
<td>0.0 %</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Total</td>
<td>7</td>
<td>100.0 %</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Applicants</th>
<th>Appl. Pool %</th>
<th>Availability %</th>
<th>Difference between Appl. Pool % and Availability %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>4</td>
<td>57.1 %</td>
<td>33.5 %</td>
<td>23.7 % Above Availability</td>
</tr>
<tr>
<td>Female</td>
<td>2</td>
<td>26.6 %</td>
<td>66.5 %</td>
<td>-39.9 % Below Availability</td>
</tr>
<tr>
<td>Sex Not Stated</td>
<td>1</td>
<td>14.3 %</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Total</td>
<td>7</td>
<td>100.0 %</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Individuals with Disabilities (IWD) &amp; Veterans</th>
<th>Percentage of Application Pool</th>
<th>Utilization Goal/Hiring Benchmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals with Disabilities (IWD)</td>
<td>14.3 %</td>
<td>7.0 %</td>
</tr>
<tr>
<td>Veterans</td>
<td>26.6 %</td>
<td>5.4 %</td>
</tr>
</tbody>
</table>
48.6. **Sample Recruitment Plan** - A Recruitment Plan which identifies diversity outreach and advertising sources should be created at the beginning of the recruitment process. However, if the target groups are still showing as **Below Availability**, additional outreach and advertising should be conducted. Below is a sample Recruitment Plan that can be implemented for an administrative position.

### Recruitment Plan

**Placement Goals**
Affirmative action placement goals for the job code are displayed below. “Yes” will be displayed if there is a placement goal for the job code selected. If there is no placement goal, the category will be blank. The recruitment plan should include appropriate outreach and positive recruitment activities that are designed to target identified categories below.

<table>
<thead>
<tr>
<th>Category</th>
<th>Utilization Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals with Disabilities (IWD)</td>
<td>7.0%</td>
</tr>
</tbody>
</table>

**Veteran Hiring Benchmark**
The recruitment plan should include appropriate outreach and positive recruitment activities that are designed to target veterans. For more information, please visit JEDRA.

<table>
<thead>
<tr>
<th>Category</th>
<th>Hiring Benchmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veterans</td>
<td>5.4%</td>
</tr>
</tbody>
</table>

### Additional Advertising Resources
After reviewing the placement goals, IWD utilization goal and veteran hiring benchmark, please list any additional advertising sources (in addition to those already identified above) such as niche sites, professional associations, networks, local organizations, etc.

Various housing organization webpages, social media, UC Res Ed email list gny
LinkedIn Groups such as Diversity: A World of Change, Women in Higher Education, Asian Americans in Higher Education, Hispanics in Higher Education.

### Other Recruitment Details
Overall recruitment plan, expected hire date, timeline for the search, other information relating to the recruitment, etc.:

**RECRUITMENT TIMELINE**
- Mid-October: position posted and advertised
- Mid-November: Review application
- Late November: first round interviews
- Mid-December: on campus interviews
- Before January 1: offers out
- January 23: start date
49. Recruitment Comments

49.1. Comments - The Recruitment Comments tab allows for comments about the particular requisition and can be submitted by all committee members. These comments will be available to Human Resources and other members of the requisition to better understand any necessary supplemental information pertinent to the recruitment. It is also suggested that when the position is filled, the name of the candidate should be noted here.

Note: Once added, recruitment comments cannot be edited or deleted.

49.2. Adding Comments

1. CLICK on the Recruitment Comments tab
2. CLICK inside the blank comments field to add comments
3. CLICK Add Comment
4. Comment will be added below along with your name, date, and time
49.3. **Attachments** - The Recruitment Attachments tab allows the search committee members to attach any necessary files or documents to the requisition for HR or other members of the department and committee to review.

49.4. Adding Attachments

1. **CLICK** on the Recruitment Attachments tab
2. **Drop a document** into the document field box or, **CLICK** to select a document to attach
3. **Select** a document from your computer files, and click **Open**
4. Attachment will be listed under Uploaded Attachments along with the file name, date, and your name
49.5. Final Action - The Final Action tab allows the Chair/Chair's Associate to make their selection and offer the position to a qualified applicant. Committee members will not see this tab. The applicant must first be marked: “Best Qualified-Selected for Hire” in the Application Review tab. Chair/Chair’s Associate can officially define the terms of employment for the new employee; including salary and salary justification. There is also a check list where it should be indicated if the prospective employee has undergone a reference check and if the offer letter has been completed. The offer letter should then be uploaded as well. Be sure to indicate if the candidate is a previous UC employee. Once the final action is complete the Chair/Chair’s Associate will route the requisition to the Departmental HR Coordinator. If multiple candidates are being hired, i.e. more than two candidates have been selected as “Best Qualified-selected for Hire,” then their names will show up under final action. Additionally, the completed recruitment checklist form should be attached under the “Recruitment Checklist” section of the Final Action tab. Recruitments cannot be finalized if the Recruitment Checklist, Offer Letter, and Reference Checks are not attached in the Final Action tab.
49.6. **Finalizing the Recruitment**

1. In the **Application Review** tab, select **Best Qualified – selected for hire** for the candidate to whom you wish to extend an offer.
2. Go to **Final Action** tab.
3. The selected candidate’s name and contact information will have auto-populated.
4. Complete the **Job Offer Information** section by clicking on the field under each heading.
5. Complete the **New Hire Checklist** section by checking the boxes next to the fields titled, **Reference Check Complete** and **Offer Letter Complete**.
6. Add attachments including the job offer letter and reference checks by clicking on **Browse**.
7. Select a document from your computer files and click **Open**.
8. The Document Title is auto populated, select the **Document Type** from the drop-down options.
9. Add a comment by clicking in the **Add a Comment** field if necessary.
10. **CLICK Save**.
11. Attachment will be listed along with the date.
5. New Hire Checklist

5.1 Reference Check Complete?

5.2 Offer Letter Complete?

6. Current UCR Employee

6.1 Is Current UCR Employee?

6.2 Employee NetID

6.2.1 Find by First, Last, or NetID

6.3 Employee ID

6.4 UC Employee Hire Type

6.5 Personnel File Reviewed?

6.6 Salary Increase > 25%

6.7 Appropriate Approvals Received?

6.8 Maximum size per file is 10MB

6.9 Drop a single file to upload.

6.10 (or click)

7. Open

7.1 File name:

7.2 All files (*.*)

7.3 Open

7.4 Cancel

Back To TOC
Update Document

- **Document Title:**
  - Job Offer Letter.docx

- **Document Type:**
  - Offer Letter

- **Add a comment:**
  - (Limited to 2000 characters)

---

Maximum size per file is 10MB

- **Drop a single file to upload.**
  - (or click)

<table>
<thead>
<tr>
<th>File</th>
<th>Type</th>
<th>Title</th>
<th>Uploaded By</th>
<th>Date Uploaded</th>
<th>Comments</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Offer Letter.docx</td>
<td>Offer</td>
<td>Job Offer</td>
<td>Jacob</td>
<td>10/25/23, 3:07</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Letter.docx</td>
<td>Letter</td>
<td>Letter.docx</td>
<td>Schiffer</td>
<td>PM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10

11
50. Routing the Recruitment for Finalization

50.1. Routing the Recruitment for Finalization

1. Go to the **Final Action** tab.

2. If you are hiring *multiple candidates* to this recruitment, ensure that all of the information is complete for each candidate.

3. Click on the **Review and Submit** tab.

4. From the **Review and Submit** tab, go to the “**Recruitment Actions Options**” menu on the top right.

5. Select “**Route to Department for Finalization**” from the drop-down menu.

The requisition will then become available in the Departmental HR Coordinator’s Recruitments, in the **Recruitments to be Finalized** tile.
51. Finalizing a Recruitment

51.1. Finalizing a Recruitment

1. The Departmental HR Coordinator selects the **Recruitments to be Finalized** tile from the Main Menu.
2. Select the recruitment that will be finalized, by clicking on the **Pencil Icon** under the **Actions** column, for the recruitment to finalize.
   a. The Departmental HR Coordinator will review the requisition, and add any comments and/or attachments, including interview notes, copies of advertisements, salary analysis, recruitment checklist, and approval emails, as necessary.
3. Click on the **Review and Submit** tab.
4. From the **Review and Submit** tab, go to the “**Recruitment Actions Options**” menu on the top right.
5. Select “**Mark Final Successful**” from the drop-down menu.

This will effectively close the recruitment and move it to **Finalized Recruitments** tile. Once completed, the requisition cannot be edited or changed. At this point an automatic email will be sent to all candidates, including those who were, letting them know that the position has been filled.
52. Your Recruitment

52.1. From the main Recruitment module in the HRMS Portal you can access all of your recruitments. You can view your posted recruitments, as well as view all of your past finalized recruitments. All posted recruitments are “view only” and any necessary changes should be sent to the Talent Acquisition team.
53. Posted Recruitment

53.1. You can access all of your current recruitments that have been posted and are currently recruiting candidates.

53.2. To view your posted recruitments

1. Go to the Recruitment module in HRMS
2. Click on Posted Recruitments
3. Click on the View button under the Actions column to view the details of that recruitment
54. Finalized Recruitments

54.1. You can access all of your recruitments that have been finalized.

54.2. To view your finalized recruitments
1. Go to the Recruitment module
2. Click on Finalized Recruitments
3. Click on the View button to view the details of that recruitment