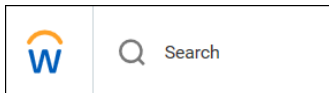


Position Restrictions (position description; filled), edit

This job aid will provide step by step instructions on how to edit the Position Restrictions of an existing filled position, including adding or modifying a position description. If editing the Position Restrictions due to a reclass, only complete these steps after the position has been approved by CFO/SABRS and budget changes have been loaded to Workday.

Step 1: Type in the employee's name in the search box and press **Enter**. You may also click on their name to go to their profile, or find the position through your organizational chart.



Step 2: Click on the *Position* hyperlink.




Step 3: Click on the *Position Restrictions* hyperlink.



Step 4: Click on **Actions** (1), hover over **Position Restrictions** (2), and select **Edit Position Restrictions** (3).

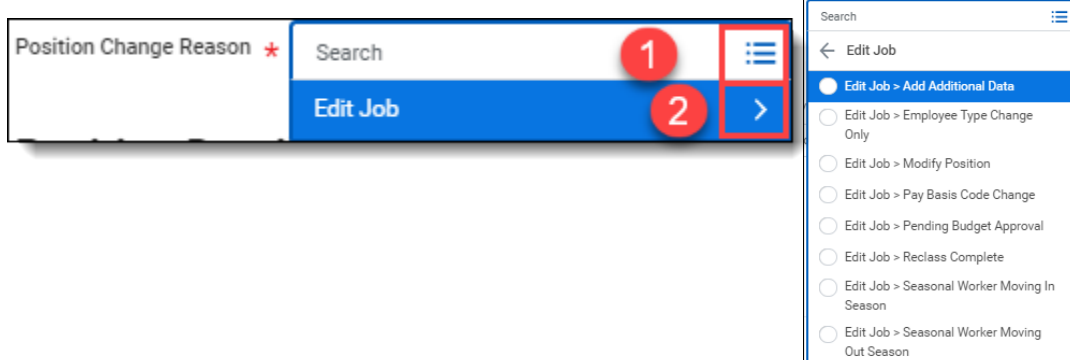


Step 5: Add the *Position Change Reason* by clicking on the menu prompt (1) and selecting **Edit Job** (2).



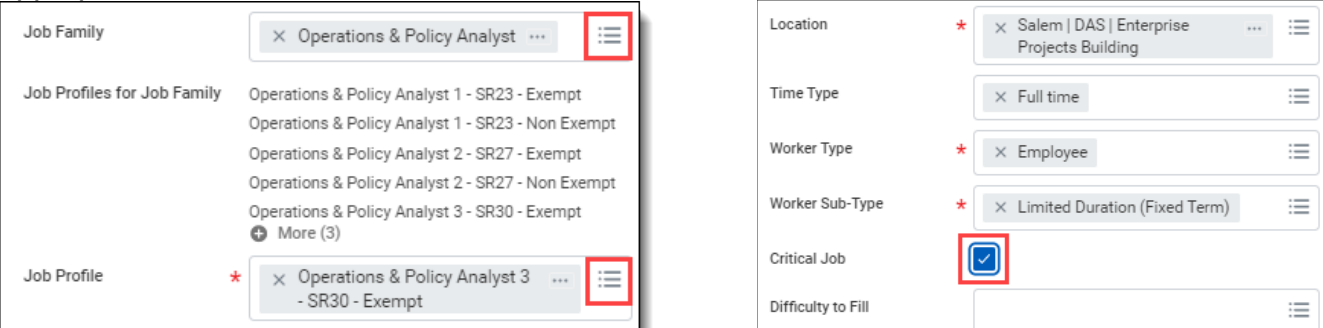
If editing for the purpose of adding or updating a position description, use the reason **Edit Job>Add Additional Data**.


If editing key components due to [Completing a Reclass](#), use the reason **Edit Job>Reclass Complete**. An HR or Compensation Partner should complete these edits. Only complete these steps after the position has been approved by CFO/SABRS and budget changes have been loaded to Workday.




Note: If changes to key components of the position restriction areas are needed (e.g. Job Family, Job Profile, Time Type, Worker Type, Worker Sub-Type, Location, etc.) please consult with your Position Analyst or HR Partner before making changes.


Step 6: Use the menu prompt in each field to update the key components of the position restrictions as appropriate.





Do not use the “X” to remove the current location, instead use the menu prompt or type in the search field to select a new location. Clicking on the X will remove the job classification field.





Critical Job is the Workday term we know as “Essential Position.” Refer to policy and/or CBA to determine Critical Job (Essential Position) designation.

Step 7: Enter the *Program and Position information* in the **Job Description Summary** box:

- Program and Position information
 - Describe the program in which the position exists. Include the program purpose, who's affected, size and scope. Include relationship with agency mission.
 - Describe the purpose of this position, and how it functions within this program. Complete this statement:

The primary purpose of this position is to . . .

This information will load to *Section 2* of the Position Description.

The screenshot displays a web form for editing a position description. The form is divided into several sections:

- Job Description Summary:** This section contains fields for 'Availability Date', 'Earliest Hire Date', 'No Job Restrictions', 'Job Family', 'Job Profiles for Job Family', 'Job Profile' (with 'Administrative Specialist 1 - SR17 - Exempt' selected), and 'Job Description Summary'. A green arrow points from this section to the 'Section 2 of the position description' box.
- Job Description:** This section contains a text area for the job description. A blue arrow points from the 'Job Description Summary' section to this text area. The text area is divided into two parts:
 - Section 2 of the position description:** This section is highlighted with a green box and contains the text: 'Program and Position information. Describe the program in which the position exists. Include the program purpose, who's affected, size and scope. Include relationship with agency mission. This position is part of the Department of Ducks, Business Support Unit. This Unit.... Describe the purpose of this position, and how it functions within this program. Complete this statement: The primary purpose of this position is to: The primary purpose of this position is to provide administrative support to the business services program.' A callout box labeled 'Section 2 of the position description' points to this section.
 - Section 3 of the position description:** This section is highlighted with a blue box and contains the text: 'Description of Duties: List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties, or "NC" for no change duties. Indicate whether the duty is an "essential" (E) or "non-essential" (NE) function. 60% - R - E - Office Support: Maintains and schedules meetings, conference rooms and check out vehicles. Orders office supplies. Composes metrics and reports on effectiveness. Completes travel vouchers, expense claims and reports for management and office staff. Working Conditions: Describe any on-going working conditions. Include any physical, sensory and environmental demands. State the frequency of exposure to these conditions. Works in an open office environment with a moderate ambient noise level. May experience frequent interruptions. Some physical demands include lifting, reaching, bending and/or standing for activities such as'. A callout box labeled 'Section 3 of the position description' points to this section.

At the bottom of the form, there are buttons for 'Submit', 'Save for Later', and 'Cancel'. A 'Done' button is also visible at the bottom right of the Job Description section.

Step 8: Enter/overwrite the description of duties information in the **Job Description** box:

- Description of Duties:
 - List the major duties of the position. State the percentage of time for each duty. Mark “N” for new duties, “R” for revised duties, or “NC” for no change duties. Indicate whether the duty is an “essential” (E) or “non-essential” (NE) function.
 - Example: 60% - R – E – Office Support: Maintains and schedules meetings, conference rooms and check out vehicles. Orders office supplies. Composes metrics and reports on effectiveness. Completes travel vouchers, expense claims and reports for management and office staff.

This information will load to *Section 3* of the Position Description.

Step 9: Click **Submit and Done**. The Position Description has been updated. To print a PDF copy of the position description, click on the *Position* hyperlink, click on *Position Restrictions* hyperlink, and click the *Position Description (BIRT)* tab. Click the **Print** button at the bottom of the page; it may take a few seconds for the document to load. Click the print icon in the upper right hand corner of the screen and then click print again.



If you need to update any of the information listed below:

- Who Reviews Employee Work
- Budget Authority (not your agency budget, who can spend money)
- Additional Job Description (including guidelines & position related decision making)
- Work Contact
- RDC or PDC
- Position Requirements (required assets such as boots, uniform, etc.)
- Working Conditions

please refer to the *Position Management* - [Additional data \(including RDC/PDC\), edit](#) job aid.

General Information for Position Descriptions	
Position Information	
EMPLOYEE INFORMATION	WHERE TO FIND
Job Profile Title	Employee Profile-Job Details-Job Profile
Business Title	Employee Profile-Job Details-Business Title
Employee Name	Employee Profile-Personal-Names
Union	Employee Profile-Personal-Union/Representation
Location	Employee Profile-Job Details-Location
Supervisor	Employee Profile-Manager
Position	Employee Profile-Job Details-Position
Time Type	Employee Profile-Job Details-Time Type
FLSA	Employee Profile-Job Details-Job Profile
Exempt Reason	Employee Profile-Position-Position Restrictions-Additional Data-Position Job Classification Group
Overtime Eligible	Employee Profile-Job Details-Position-Job Classification
Employee Type	Employee Profile-Job Details-Employee Type
Classification ID	Employee Profile-Personal-Union/Representation-Job Profile as of End Date-Job Code
Position ID	Employee Profile-Job Details-Organization-Positions-Position ID
Company ID	Employee Profile-Job Details-Organization-Positions-Company ID
Budget Authorization Number	Employee Profile-Job Details-Position-Position Restrictions-Additional Data-Position Details for Budget Execution-Budget Authorization Number