

Position Description (PD)

The PD isn't automatically added into Workday. Some of the information is automatically populated through other business processes, but the majority is not. **Before making any changes to the PD, contact your HR Partner to determine who is responsible for adding and updating a PD in Workday.**

The security roles that can modify PDs are Managers, HR Assistants, Workforce Liaisons, HR Partners and Compensation Partners.

Updating the position description will not change the actual job profile (classification) as part of the classification system. The overall format will be similar to the current State of Oregon position description form, which includes the program/agency information and purpose of the position. It will include the major duties those that are new, revised, not changed and non-essentials.

The following sections from the Word PD template are combined in Workday under Position Restrictions in the Job Description Summary field.

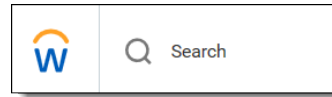
- Program and Position Information
- Description of Duties
- Working Conditions

The following sections from the Word PD template are combined in Workday under Position Restrictions in the Job Description field.

- Guidelines
- Work Contacts
- Position Related Decision Making
- Review of Work
- Oversight Functions
- Additional Position Related Information

This job aid will provide you with step by step instructions on how to add or update a PD to an existing position.

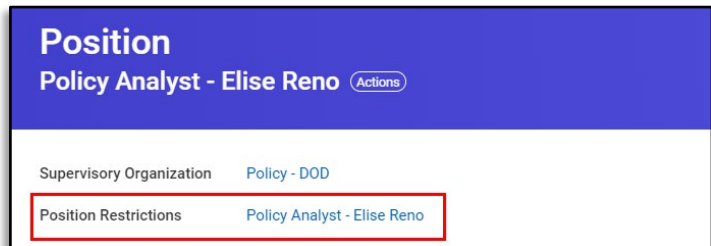
Step 1: Type in the employee's name in the search box and **Press** enter.



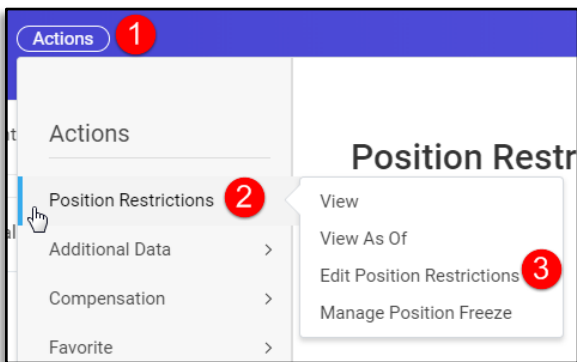
Step 2: Click the *Position* hyperlink.



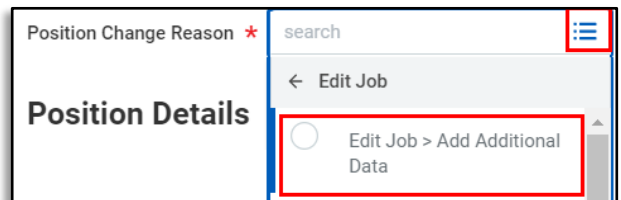
Step 3: Click the *Position Restrictions* hyperlink.



Step 4: Click the Actions button (1) Hover over *Position Restrictions* (2) and select **Edit Position Restrictions** (3).



Step 5: Add the *Position Change Reason* by clicking on the drop down menu, selecting **Edit Job**, Edit Job > Add Additional Data.



Step 6: Job Description Summary is where you will update or add the Program and Position information, Description of Duties, and Working Conditions. Include the following information:

- 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.....*”
- 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 – Management/Supervision:** Supervise, hire, monitor performance, develop, coach, discipline and provide direction to employees. Respond to and resolve employee grievances. Assign and plan work.
- Working Conditions:
 - Describe any on-going working conditions. Include any physical, sensory and environmental demands. State the frequency of exposure to these conditions.

The screenshot shows a web form for editing a job position. On the left, there are several input fields: 'Number of Positions' (set to 1), 'Hiring Restrictions', 'Qualifications', 'Availability Date' (MM/DD/YYYY), 'Earliest Hire Date' (MM/DD/YYYY), 'No Job Restrictions' (checkbox), 'Job Family', 'Job Profiles for Job Family' (empty), 'Job Profile' (Administrative Specialist 1 - SR17 - Exempt), 'Job Description Summary', 'Job Description' (with a rich text editor), 'Location' (Public Service Building), 'Time Type' (Full time), and 'Worker Type' (Employee). At the bottom are 'Submit', 'Save for Later', and 'Cancel' buttons. On the right, a 'Job Description' panel is open, showing a rich text editor with the following content:

Job Description

Normal | B | I | U | A | [List Icon] | [Link Icon]

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....*

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 stooping for activities such as*

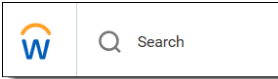
Done

Step 7: Click **Submit**. The Job Position has been updated.

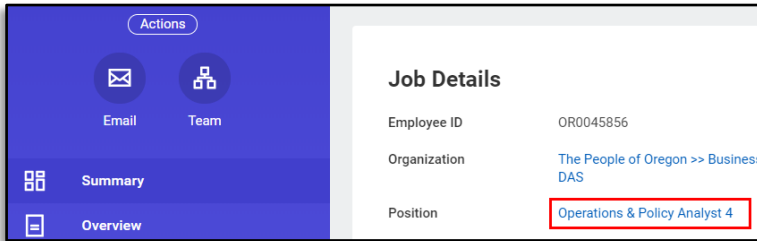
Edit Additional Information

This section provides you with step by step instructions on how to edit Additional Data on a position. From here, you can update the guidelines, work contacts, position related decision making, review of work, and oversight functions.

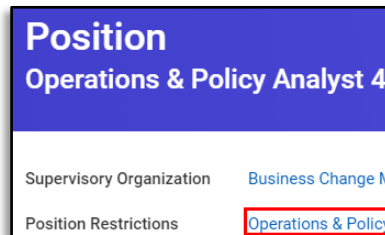
Step 1: Type in the employee's name in the search box and **Press** enter. You may also **Click** on their name to go to their profile, OR find the position through your organizational chart.



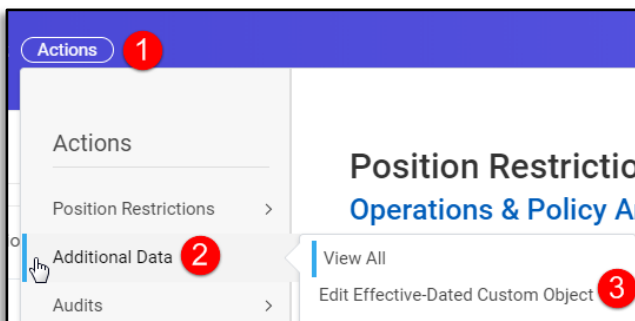
Step 2: Click the *Position* hyperlink.



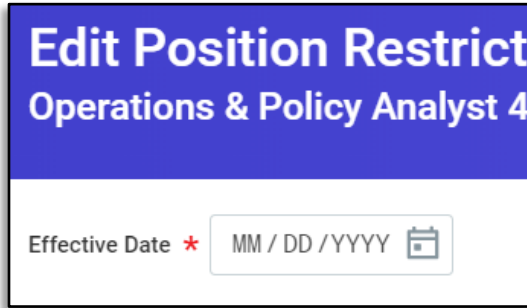
Step 3: Click the *Position Restrictions* hyperlink.



Step 4: Click on the Actions button (1) Hover over *Additional Data* (2) and select **Edit Effective-Dated Custom Object** (3).

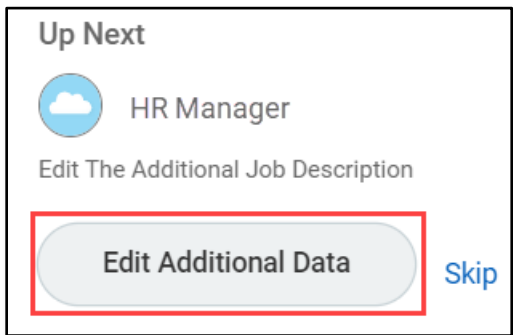


Step 5: Enter the effective date of the changes. Click **Submit**.



The following tasks may not appear in this exact order. You will fill them in as they appear.

Step 6: Click the **Edit Additional Data** button.



Note: Once you complete a task in the Edit Position Restrictions Additional Data, you will be taken back to the screen in Step 6 where you can Edit Additional Data or select Done once you have completed editing all the information you needed to.

Step 7: For the Review of Work task, you will want to specify the position that is responsible for reviewing the work of the employee. Click the “+” icon to add a row. Insert the following information in the fields. Click **Submit** when you are finished adding all the information.

1. Type in the Job Profile Title from the [statewide classification specifications](#) for the person who reviews the employees work.
2. Type in the Position Number for the person who reviews the employees work.
3. Select the method for reviewing the employee's work by clicking on the drop down menu.
4. Select how often the employee’s work will be reviewed by clicking on the drop down menu.
5. Type in the reason why the manager reviews the employees work.

The screenshot shows a table titled "Review of Work" with one item. The table has five columns: *Classification Title, Position Number, How, How Often, and Purpose of Review. Red circles with numbers 1 through 5 are placed over each column header. The data in the row is: *Classification Title: PEM F; Position Number: 7410201; How: In Person, by mail, email or telephone; How Often: As Needed; Purpose of Review: The incumbent works independently.

	*Classification Title 1	Position Number 2	How 3	How Often 4	Purpose of Review 5
+	PEM F	7410201	In Person, by mail, email or telephone	As Needed	The incumbent works independently

Step 8: For the Work Contacts task, you will want to identify who, outside of co-workers in the employees work unit, must the employee in the position regularly come into contact with. Click the “+” icon to add a row. Insert the following information in the fields. Click **Submit** when you are finished adding all the information.

1. Type in the people or groups of people the employee has contact with, excluding co-workers.
2. Select the method for how the employee contacts them by clicking on the drop down menu.
3. Type in why the employee makes contact with these people.
4. Select the how often the employee makes contact with them by clicking on the drop down menu.

The screenshot shows a table titled "Work Contacts" with two items. The table has four columns: *Who Contacted, How, Purpose, and How Often. Red circles with numbers 1 through 4 are placed over each column header. The data in the rows is: Row 1: *Who Contacted: Agency Managers; How: In Person, by mail, email or telephone; Purpose: Advise, consult, and inform on HR iss; How Often: Daily. Row 2: *Who Contacted: All staff levels of the agency; How: In Person, by mail, email or telephone; Purpose: Consult and inform on HR issues.; How Often: Daily.

	*Who Contacted 1	How 2	Purpose 3	How Often 4
+	Agency Managers	In Person, by mail, email or telephone	Advise, consult, and inform on HR iss	Daily
+	All staff levels of the agency	In Person, by mail, email or telephone	Consult and inform on HR issues.	Daily

Step 9: To add Additional Job Description items, click the “+” icon to add a row. Insert the following information in the fields. Click **Submit** when you are finished adding all the information.

1. Type in any established guidelines used in the position, such as state or federal laws or regulations, policies, manuals, or desk procedures.
2. Type in how these guidelines are used.
3. Type in the position related decision making the employee is responsible for. Describe the typical decisions of the position and explain the direct effect of these decisions.
4. Type in additional position related information including any knowledge and/or skills needed at time of hire that are not already required in the classification specification.
5. Type in any oversight activities the position is responsible for (this is for supervisory positions only). Identify how many employees are directly supervised by the position and how many employees are supervised through a subordinate supervisor if applicable. Also identify what supervisory activities the position does. For example, plans, assigns, and approves work; responds to grievances; disciplines and rewards employee behavior; coordinates employees schedules; hires and discharges employees; prepares and signs performance evaluations.

Additional Job Description							
0 Items							
+	*Number	1	2	3	4	5	☰ ↗
		Guidelines (List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures)	Guidelines (How are these guidelines used?)	Position Related Decision Making (Describe the typical decisions of this position. Explain the direct effect of these decisions.)	Additional Position Related Information (ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification)	Oversight Activities (For supervisory positions only)	
No Data							

Step 10: If the position has final authority to spend or encumber money for staff, supplies, or equipment, you will need to add this information in the Budget Authority task. Click the “+” icon to add a row. Insert the following information in the fields. Click **Submit** when you are finished adding all the information.

1. In this field, identify the expenditure category the position has budget authority for (i.e. services and supplies, personal services, capital outlay, etc.).
2. In this field, identify the total amount of budget authority the position has for the biennium within this expenditure category.
3. In this field, identify where the funding is coming from (i.e. general funds, lottery funds, federal funds, or other funds).

Budget Authority					
1 item					
+	*Operating Area	1	2	3	☰ ↗
		Biennial Amount		Fund Type	
-					

Step 11: Once you are done editing all of the additional information tasks, click **Submit** and **Done**.