

PCQ eForm

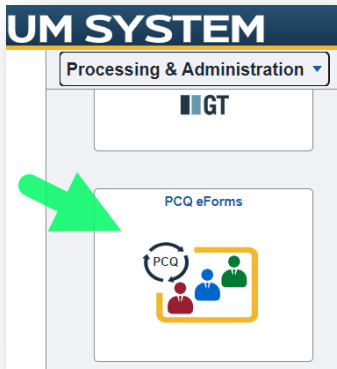
The PCQ form is used to request new benefit eligible positions and evaluate existing benefit eligible positions for reclassification.

Position classification is a system for objectively defining and evaluating job duties, responsibilities, and level of work performed to align the position within the university’s job structure including the salary structure grade, job title, minimum requirements and exemption status under the FLSA.

Once submitted, the form is routed to the Department, HR, and possibly Compensation for review.

Navigation

- 1. Log into [HRPRD](#) and from either the Processing & Administration or Manager Self-Service homepage, click the **PCQ eForms** tile.



- 2. The **PCQ eForms Landing** page appears.

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Add a PCQ eForm – Initiator

The full PCQ eForm has several sections, which we will examine in order. Options selected at the initiator stop affect the workflow/routing of the PCQ. This includes pay increases, using the abbreviated form, and the request type.

IMPORTANT: If you need to save the form before completing and submitting, refer to the [Save a PCQ eForm topic](#) in the appendix.

1 Summary

1. [Navigate](#) to the PCQ eForm page. The **Landing Page** opens by default.

The screenshot shows the 'Landing Page' of the PCQ eForm system. On the left is a navigation menu with four options: 'Add a PCQ eForm', 'Evaluate a PCQ eForm', 'Update a PCQ eForm', and 'View a PCQ eForm'. A green circle with the letter 'b' is placed over the 'Add a PCQ eForm' option. The main content area on the right has a red header that says 'ATTENTION! – PLEASE REVIEW PRIOR TO STARTING THIS FORM'. Below this, a green circle with the letter 'a' is placed over the first paragraph of text, which states that for positions with incumbents, earnings must be distributed 'By Percent' and that the JED row(s) should be updated from 'amount' to 'percent' if necessary. Below this text are two sections: 'This form should be used for:' with a bulleted list of valid uses (benefit eligible position, reclassification), and 'This form should NOT be used for:' with a bulleted list of invalid uses (MU Healthcare positions, performance, faculty positions, union eligible classifications). At the bottom, there are 'Helpful links' for 'Job Code Detail' and 'PCQ Guide/Training'.

- a. Read the important information about how the PCQ eForm should be used.
- b. Click **Add a PCQ eForm**.

2. The **Add Position Classification Request** page appears.

NOTE: When you tab out of a field or use your cursor to click into the next field, do not enter anything until the Page Refresh icon (rotating blue dots) disappears, indicating that the previous field has been populated and you may continue to enter information.

Add Position Classification Request : Position Classification Information Form ID 3635851

PURPOSE AND INSTRUCTIONS

This form is designed to collect detailed information for the purpose of evaluating staff positions. As a supervisor/manager your input is very important as your answers will be used as official documentation for evaluating the job in the University's Global Grading System. You are welcome to further describe the answer to any question at the end of the form, or by attaching additional pages. Please keep the following concepts in mind as you complete the questions:

- **A current organizational chart is required.** This must contain actual classification/titles and show who the position reports to, and all direct reports to the position (if applicable). Working titles may also be provided if applicable. This can be simple or handwritten, but must be detailed enough to show how this specific position fits into the organization.
- **Describe the position as it currently exists,** not as it was in the past, or may be in the future.
- **Describe the position as it is typically conducted** over an extended period of time (e.g. year); do not describe just a particular dimension of the position or a temporary assignment.
- **Avoid understating or overstating the positions' duties and requirements.** It may be helpful to think about the responsibilities as though you were explaining the position to new staff.
- **Consider how the position would normally be performed** by the typical employee. Feel free to discuss responses with employees in the position, colleagues, or other managers.
- If the job is currently occupied, **consider the job only,** not the employee in the job.

Position Classification Questionnaire

*Proposed Effective Date: 05/01/2024

*Request Type: Reclassify Existing Post

*Position #: 00005390

Position Description: RESEARCH SPECIALIST SR

Provide additional information or special instructions here if needed.

Additional Information

Save

- Read the information in the **Purpose and Instructions** section.
- You should copy or write down the **Form ID** in the upper right corner and place it somewhere you can find later, because if you are unable to finish adding a PCQ eForm in one session, you can click **Save** at the bottom of the page at any time to save your progress.* To save, you must be in the **Review and Submit** section. For more information on saving a form, refer to the [Save a PCQ eForm](#) topic in the appendix. When you're ready to begin again, select **Update a PCQ eForm** and enter or paste the Form ID that you copied.
*You will receive error warnings if you try to save when required fields are not completed.
- In the **Position Classification Questionnaire** section, enter or select the **Proposed Effective Date**. This is the date you propose the change to be effective and it is required to save the form. If there is no pay change associated with the PCQ, this is the effective date that will load into position management and job data if applicable. Note: For new positions or reclassification of a vacant position, it may be helpful to enter the current date if you plan to use this for recruitment. Otherwise, you will need to wait until the stated effective date to be able to use the position in a job posting.
- Select the **Request Type** (New Position or Reclassify Existing Position). **Note:** This field is required to save the form.
 - If you select **Reclassify Existing Position**, enter the **Position #** in the field that appears.
The position number will be required to save the form when reclassifying an existing position.
 - If you select **New Position**, the **Number of Positions** field that appears defaults to 1 but can be updated if needed.
 - The form will error if the number of positions is set to 0 (zero).

Number of Positions 2

- e. Optional: Provide **additional information** or special instructions in the **S1** text field (e.g., position is grant funded, or expedited request). This field should not be used to communicate with the final HR ePAF approvers.
- f. The **Research** toggle defaults to **No**. If you change it to **Yes**, additional questions appear in the Research section to answer.

- g. The **Use Abbreviated Process?** toggle defaults to No. Conditions for using the abbreviated process are listed.

We did not use the abbreviated process in this demonstration, but this guide will indicate if a section is available when using the abbreviated process.

- h. The **Section** field defaults to **1 Summary**, the first section. In this demonstration, we will do each section in order. To complete the form top to bottom and not have to select each section individually, select **Review and Submit** in the dropdown.
- i. If you are reclassifying an existing position, the **Current Position Summary** displays information about the position. If the position has one incumbent, their name and EMPLID is listed.

If the position is vacant, there will be a note that says this position currently has no incumbents.

If the position has multiple incumbents, a note will indicate that it has multiple incumbents.

The Current Position Summary will not show if New Position is selected in step 2d above.

If this position has a Research focus, set the Research field below to Yes, and complete the Addendum in the Research Section.

Research ☐ No ☒ Yes **f**

Abbreviated Process Criteria

The nonexempt and IT position classification processes must meet the following requirements in order to use the abbreviated process:

1. Position is either vacant OR has had the same incumbent for 6 months or longer;
2. Two grade change maximum (requested title is no more than a two grade change); AND
3. Proposed position must be nonexempt.

IT

1. The proposed title must be in the IT job family.

*Not to be used for the reclassification of occupied union titles.

Use Abbreviated Process? ☐ No ☒ Yes **g**

Section **1 Summary** **h**

Current Position Summary **i**

Incumbent Name	██████████	Incumbent Empl ID	██████████
Business Unit	COLUM University of MO-Columbia	Grade	012
Department	CDEVELOP Advancement	Salary	\$84,000.000000
Job Code	4104 ADVANCEMENT DIR II	Compa-Ratio	0.84
Working Title		Pay Range Minimum	\$67,745.600000
Regular/Temporary	Regular	Pay Range Midpoint	\$100,027.200000
Standard Hours	30.00	Pay Range Maximum	\$132,308.800000
Supervisor	██████████		
2nd Level Manager	██████████		

Current Position Summary

This Position currently has no incumbents.

Current Position Summary

This Position currently has multiple incumbents.

Complete the required fields in the **Proposed Position Summary** section.

- j. Expand the **Incumbent Experience** field and select an option. ***Note:** The incumbent experience questions will not appear if the position is vacant.*

If you select **In Position Under 6 Months** in the **Incumbent Experience** field, a message appears in red font:

You indicated that this position has an incumbent that has been in the position for less than 6 months. This position is not eligible for reclassification. Please consult your HR Partner.

If you select **In Position More Than 6 Months**, complete the following fields:

- k. In field **S2**, describe **WHEN** the duties changed since the last evaluation.
- l. In field **S3**, describe **WHY** the duties changed since the last evaluation.
- m. In field **S4**, describe **HOW** the duties changed since the last evaluation.

The screenshot shows the 'Proposed Position Summary' section of the eForm. At the top, there is a dropdown menu for '*Incumbent Experience?' with the option 'In Position More Than 6 Months' selected. A green circle with the letter 'j' points to this dropdown. Below this, there are three text input fields. The first is labeled '*S2' and 'When duties changed', with a green circle 'k' pointing to it. The second is labeled 'S3' and 'Why duties changed', with a green circle 'l' pointing to it. The third is labeled 'S4' and 'How duties changed', with a green circle 'm' pointing to it. Each field has a corresponding instruction line above it: 'This is a reclassification for an occupied position, describe **when** the duties changed since the last evaluation.' for S2, 'This is a reclassification for an occupied position, describe **why** the duties changed since the last evaluation.' for S3, and 'This is a reclassification for an occupied position, describe **how** the duties changed since the last evaluation.' for S4. At the bottom of the form, the text 'PROPOSED POSITION INFORMATION' is visible.

Next, complete the required fields in the **PROPOSED POSITION INFORMATION** section.

- n. The **Business Unit** and **Department ID** are pre-populated. These fields are required to save the form.
***Note:** If you are requesting a new position, you must enter the supervisor's information.*

- o. Enter or use the lookup button to select the **Job Code**, which is required to save the form. Once you select the Job Code, the fields on the right side are populated: Grade, FLSA Status, Hourly Rate Minimum, Midpoint, and Maximum, Annual Rate Minimum, Midpoint, and Maximum.

PROPOSED POSITION INFORMATION

n Business Unit COLUM University of MO-Columbia
 Department ID CDEVELOP Advancement

*Job Code 4105 **o** ADVANCEMENT DIR III

Job Family AD

Working Title Working Title Here **p**

Regular/Temporary Regular

*Proposed Standard Hours 35.00 **q**

Supervisor ID **r**

Second Level Manager

Grade 013

FLSA Status Administrative

Hourly Rate Minimum 37.770000

Hourly Rate Midpoint 57.730000

Hourly Rate Maximum 77.690000

Annual Rate Minimum \$78,561.600000

Annual Rate Midpoint \$120,078.400000

Annual Rate Maximum \$161,595.200000

If the FLSA status is going from exempt to nonexempt, the form will error and can't be submitted.

A PCQ cannot be completed because the job title change you have proposed would result in a change in FLSA status. Please consult your Human Resources Partner. (0,0)
 The PeopleCode program executed an Error statement, which has produced this message.

OK

- p. The **Working Title** field will populate if one exists, or you can enter one. This field is read-only if this is for a new position or a reclassification of an existing position that is vacant or has multiple incumbents.
- q. Enter the **Proposed Standard Hours** (between 30 and 40 hours per week). If the position being requested is expected to work less than 30 hours per week, this does not go through the PCQ process.
- r. A view behind the position number pulls in the **Supervisor ID** and **Second Level Manager**.
***Note:** If you are requesting a new position, you must enter the supervisor's information.*

Complete the required fields under **PROPOSED INCUMBENT PAY INFORMATION**.

Note: This section will not appear if single incumbent with JED distributed by amount or if the position has multiple incumbents. In these instances, a job change ePAF will be required after the PCQ is approved in order to update the job code and pay information in Job Data.

- s. The **Are you requesting a pay change?** field defaults to **No**. Toggle it to **Yes** if you are requesting a pay change; three more fields appear.
- t. Select if the proposed compensation rate is **Monthly** or **Hourly** paid from the dropdown. This selection will determine the pay group that will load into Job Data.
- u. Enter the **Proposed Comp Rate (Hourly or Monthly)**. **Do not enter annual salary** in this field.
- v. Enter the **Justification for Increase** in the text field. This is what the campuses are currently using on the Justification for Increase Form or within the Justification for Increase Database that Columbia campus and UM System use.

PROPOSED INCUMBENT PAY INFORMATION

Are you requesting a pay change? **Yes** S

*Hourly or Monthly paid? Hourly t

*Proposed Comp Rate (Hourly or Monthly) 25.00 u

*Justification for Increase
Justification Here v

- w. Under **POSITION SUMMARY**, briefly describe why the position exists and its primary purpose. (Specific responsibilities will be answered in the next section.)

POSITION SUMMARY

In a few (two to three) sentences, describe why this position exists and its primary purpose. Do not list specific key responsibilities here; they are covered in the next section.

*\$5 Why does position exist? W

Perform the following steps in the **Key Responsibilities** section.

x. Read the information about this section.

y. Type a description of the most important responsibilities.

z. Enter the percentage of time that responsibility will use.
(Refer to the **Periodic Equivalencies** table.)

aa. Click the **Insert a Row** (+ sign button) to add a second row and enter the second most important responsibility.

Key Responsibilities

List, in order of importance, specific major duties and responsibilities and estimate the average percentage of time spent on each. The following chart will assist you in estimating time percentages on an annual basis:

% of Time	Periodic Equivalencies			
	Daily	Weekly	Monthly	Yearly (annually)
5%	30 minutes	2 hours	1 day	2.5 weeks
10%	1 hour	4 hours	2 days	5 weeks
20%	2 hours	1 day	4.5 days	2.5 months

X Insert the job as it is currently performed (may not match the existing job description).
 • Each statement should be brief and concise, beginning with an action verb. Use a separate statement for each major duty or responsibility.
 • Duties or responsibilities that take less than 10% of the employee's time should not be shown as a separate statement but group with other related duties.
 • Consideration should be given to breaking into smaller increments (10% or more) any duties or responsibilities that constitute 30% or more of the employee's time.
 • Ensure that a task is not a restatement or overlap of any other statement.
 • Review the order of importance and percentage of time.

List most important duties and responsibilities first.

*Key Responsibilities	% of Time	Insert A Row	Delete A Row
1 Resp 1	25	+	-
2 Resp 2	50	+	-
3 Resp 3	25	+	-

Key Responsibility Percentage of Time Total

Total % of Time 100

Continue adding key responsibilities until the main responsibilities are listed and their percentages total 100.

bb. As each Key Responsibility is listed in the previous step, the **Total % of Time** updates to display the sum of their percentages.

They must total exactly **100%** when the form is submitted. If they don't, a warning will appear, and the form cannot be submitted until the percentages are fixed to total 100%.

3. A **Sections** section is always positioned at the bottom of the selected section.

Note: If you are doing the abbreviated process, you will see fewer options than the eight shown in this demonstration.

Expand the **Section** options and select **2 Experience**.

Sections

Select the section you would like to work on.

Section: 1 Summary

File Attachments

Attachment Required

- 1 Summary
- 2 Experience
- 3 Responsibilities
- 4 Duties
- 5 Working Conditions
- 6 Research
- 7 Organizational Structure
- 8 Review and Submit

2 Experience

Note: This section shows in the abbreviated process.

- When you select a new section from the bottom of the page, it appears *above* the **Sections** section. Scroll upward to complete the new section. It will begin beneath the **Position Classification Questionnaire** section that we completed in the 1 Summary topic.
- In the **Education and Work Experience** section:
 - Select the **Education Level**.
 - The **Major or Related Area** field will only show if a selection other than **High School Diploma** is selected. Enter the major or related area, clearly indicating if the area of study is preferred or required.
 - The **Equivalent Experience in Lieu of Degree Allowed** toggle defaults to **Yes**. Change it if the position requires the education level selected above.
 - Enter the appropriate number in the **Required Years of Experience** field.
 - Enter the type of experience that is required.
 - The **Licenses or Certification** toggle defaults to **No**. Changing it to **Yes** adds two comment boxes (E3 and E4) for listing licensure or certification.
- Select the next section: **3 Responsibilities**.

Education and Work Experience

Education

What is the minimum amount of education and related work experience required to perform the duties of the position satisfactorily? Choose the minimum level of education, describe the Major / Related Area of Study, and select Yes if there is an equivalent experience in lieu of Degree.

*Education Level 3. Bachelor's Degree a

Major or Related Area English literature. b

Equivalent Experience in Lieu of Degree Allowed? Yes c

Experience

What is the minimum amount of related work experience required to perform the duties of the position satisfactorily? List the number of years required (in whole years), and describe the type of experience in the space below. If experience can be substituted for the education requirements, indicate the type and amount of experience that will substitute separately.

Example:

- Two years of clerical experience is required. Prior experience in medical office is preferred.

Required Years of Experience 2 d

E2 Two years of clerical experience is required. Prior experience in English research is preferred. e

Are there Licenses or Certification required or preferred? No f

Sections

Select the section you would like to work on.

Section 2 Experience g

File Attachments

Attachment	File Name	Delete
1 Summary		
2 Experience		
3 Responsibilities		
4 Duties		
5 Working Conditions		
6 Present		

1 row

Instructions

3 Responsibilities

Note: This section does not show in the abbreviated process.

- The **Responsibilities** section appears above the **Sections** section when selected from the **Section** option list; scroll up to complete this section.

- Under **Supervising**, only the first question (R1) appears, and it defaults to **No**. If you change the answer to **Yes**, five additional questions appear (R2 – R6), which default to **No**.
- The **DIRECT REPORTS TO POSITION BEING EVALUATED** fields appear if question R1 is answered **Yes**. Enter the appropriate number of each type of **Direct** and **Indirect Reports**.

The **Total FTE** for each applicable type becomes a required field; enter the FTE.

- The “If the position being evaluated supervises others...” fields appear if question R1 is answered **Yes**. The listed responsibilities default to **No**.

Toggle the switches to **Yes** where appropriate.

Responsibilities

LEADERSHIP/SUPERVISORY RESPONSIBILITIES
Select the descriptions that best fits the job being evaluated:

Supervising **a**
Does the position supervise
R1 ☒ Yes

Does this position supervise students only
R2 ☐ No

Supervises a group of employees who generally perform similar work
R3 ☐ No

May occasionally do the work of those supervised (< 20% of time)
R4 ☐ No

Coordinates and supervises the daily activities of a team with support and/or operations focus
R5 ☐ No

Sets priorities for the team to ensure task completion
R6 ☐ No

DIRECT REPORTS TO POSITION BEING EVALUATED: **b**
Direct Reports

Student Count
Non-exempt Count
Exempt Count

Indirect Reports

Student Count
Non-exempt Count
Exempt Count

Total FTE

Total Student FTE
Total Non-exempt FTE
Total Exempt FTE

Indirect Reports

Total Student FTE
Total Non-exempt FTE
Total Exempt FTE

If the position being evaluated supervises others, select the responsibilities below that are applicable: **c**

Recruits, screens, and interviews candidates ☐ No
Recommends candidates for hire ☐ No
Recommends salary actions ☐ No
Assigns tasks or responsibilities to others ☐ No
Monitors work performance ☐ No

Conducts performance appraisals ☐ No
Administers disciplinary action ☐ No
Recommends termination of employees ☐ No
Conducts training of others ☐ No

- d. The **Work leadership** fields appear if question R1 is answered Yes. The two questions default to **No**.

Click to toggle **Yes** where appropriate.

- e. The **Managing** fields appear if question R1 is answered Yes. The four questions default to **No**.

Click to toggle **Yes** where appropriate.

- f. The **Directing** fields appear if question R1 is answered Yes. The four questions default to **No**.

Click to toggle **Yes** where appropriate.

Work leadership **d**
Leads daily activities of a team including assigned projects or tasks

R7 ☒ Yes

Coordinates the daily activities of a small to medium-size team with a support and/or operations focus

R8 ☐ No

Managing **e**
Manages professional employees and/or supervisors

R9 ☐ No

Defines operating standards and ensures essential procedures are followed based on knowledge of own discipline

R10 ☐ No

Develops departmental plans, including business, operational and/or organizational priorities

R11 ☒ Yes

Accountable for performance and results of multiple teams

R12 ☐ No

Directing **f**
Provides leadership and direction through Managers

R13 ☒ Yes

Adapts and executes functional or departmental business plans

R14 ☐ No

Decisions are guided by organizational and functional strategies and priorities

R15 ☐ No

Accountable for performance and results for multiple functions or division

R16 ☐ No

g. Does this position have responsibility for a budget?

The switch defaults to **No**. If you answer **Yes**, a new, required field for **Budget Amount** appears.

[View screenshot.](#)

h. The “Does this position” section always appears except when the form is an abbreviated process. If you toggle **Yes** on a question, a required **Explain/Provide Context** text field appears.

[View screenshot.](#)

i. The **R17** field always appears except when the form is an abbreviated process. The field must be completed to submit the form. Select the appropriate response for the category that best corresponds with the highest level of fiscal responsibility in the position.

Fiscal Responsibility g

Describe the budget or fiscal authority and accountability of the position, including responsibility for generating and collecting revenue, approving expenses, and managing the budget.

Does this position have responsibility for a budget? ☐ No

Does this position h

Negotiate contracts? ☐ No

Manage grants? ☐ No

Reconcile accounts? ☐ No

Manage service or auxiliary operations? ☐ No

Select the category below which best corresponds with the highest level of fiscal responsibility exercised by this position.

1. **Not Applicable**
2. **Supports** - Tracks expenditures for an organizational level - Has no decision making or spending authority - Some budgetary proficiency required
3. **Recommends** - Makes recommendations on budgetary decisions - May have authority to approve expense items - May recommend on revenue
4. **Controls** - Responsible for the budget for an organizational level of the university - Has accountability for all expenses within an organizational unit

i **R17**

2. When finished, select **4 Duties**.

Sections

Select the section you would like to work on.

Section

- 1 Summary
- 2 Experience
- 3 Responsibilities
- 4 Duties
- 5 Working Conditions
- 6 Research
- 7 Organizational Structure
- 8 Review and Submit

4 Duties

Note: This section does not show in the abbreviated process.

1. The **Duties** section appears above the **Sections** section when selected from the **Section** options list near the bottom of the page; scroll up to complete this section.
 - a. Under **Independent Judgment / Problem Solving**, read the descriptions, enter the numbers that best fit, and provide examples in the text boxes.
 - b. Under **Work Complexity**, read the descriptions, enter the number that best fits, and provide examples in the text boxes.
 - c. Under **Magnitude of Impact**, read the descriptions, enter the number that best fits, and provide examples in the text box.
 - d. Under **Internal/External Contacts**, read the descriptions, enter the numbers that best fit, and provide examples in the text boxes.

2. When finished, select **5 Working Conditions**.

Sections

Select the section you would like to work on.

Section **4 Duties**

- 1 Summary
- 2 Experience
- 3 Responsibilities
- 4 Duties
- 5 Working Conditions**
- 6 Research
- 7 Organizational Structure
- 8 Review and Submit

Duties

a

INDEPENDENT JUDGMENT / PROBLEM SOLVING

Select the description that best fits the job being evaluated (focus on position requirements not incumbent performance)

1. Performs tasks and duties under direct supervision, using well-defined policies and procedures. Work is reviewed by supervisor. Limited opportunity exists for exercising independent judgment and decision making. Refers most problems to supervisor.
2. Performs tasks and duties under general supervision, using established procedures and innovation. Chooses from limited alternatives to resolve problems. Occasionally independent judgment is required to complete work assignments. Often makes recommendations to work procedures, policies, and practices. Refers unusual problems to supervisor.
3. Performs duties within the scope of general university policies, procedures, and objectives. Analyzes problems and performs needs assessments. Uses judgment in adapting broad guidelines to achieve desired result. Regular exercise of independent judgment within accepted practices. Makes recommendations that affect policies, procedures, and practices. Refers exceptions to policy and procedures to the supervisor.
4. Develops objectives and general policies and procedures for a specific program or functional area of responsibility within general scope of established operational goals and plans. Day-to-day work and decisions do not require direction or review by immediate supervisor. End results are reviewed by supervisor. Strategic issues are referred to supervisor.
5. Develops strategic direction, goals, plans, and policies for an area of responsibility. Sets broad objectives and is accountable for overall results in respective area of responsibility. Authority to make independent decisions on matters of significance. Requires high degree of independent judgment and problem solving.

*Choose number that best fits the position

Provide examples of the job being evaluated:

Which of the following

1. Most (or the majority) of the time
2. Most (or the majority) of the time

*Choose number that best fits the position

Provide two (or three) examples of the job being evaluated:

c

MAGNITUDE OF IMPACT

Select the description that best fits the job, and provide a specific example:

1. Impact on single workgroup, department or program
2. Impact on more than one department / program
3. Impact on a division, broad range of departments or programs or multiple departments / program
4. Impact on more than one division or unit, the campus, and/or the entire university system

*Choose number that best fits the position

Provide an example to support the above selection.

The work only impacts one program.

d

INTERNAL / EXTERNAL CONTACTS

Type of contact: select the description that best fits.

1. Little or no contact with others outside own workgroup. Primary purpose of contact is to provide and/or receive routine information or documents.
2. Some contact with others outside own workgroup, such as students, general public, visitors, and/or other university employees. Primary purpose of contact is to provide or obtain explanation or interpretation of information.
3. Regular contact with others outside own workgroup, such as students, general public, visitors, and/or other university employees. Primary purpose of contact is to explain, clarify, or interpret information. May handle confidential information and some complex matters.
4. Regular and substantial contact with others outside own workgroup. Contacts usually involve discussions related to policies and programs and may include proposal or grant writing, negotiation with vendors, etc. Handles sensitive, complex, and/or confidential information.
5. High-level contact with others across the university in key positions. Contact usually involves several areas within the university and/or with community, government, business leaders, media, and dignitaries. Typically handles highly sensitive and/or confidential information.

*Choose number that best fits the position

Nature of contact: select the description that best fits.

1. Receives/provides routine information; common courtesy and ordinary tact.
2. Explains or interprets guidelines or instructions or elicit opinions; moderate tact and cooperation required.
3. Provides detailed and somewhat complex/sensitive information; contacts are non-routine and require discretion and thoughtful communication efforts.
4. Exchange of highly complex information; substantial sensitivity, discretion and cooperation required; usually follow-up action is needed.
5. Solves problems through discussion or persuasion; issues may have substantial impact on the university or be controversial, which requires high level of tact and sensitivity.

*Choose number that best fits the position

If there is routine contact with others outside of the work group, provide examples of who and the nature or context of the contact.

Provide examples here.

b

WORK COMPLEXITY

Select the description

1. Tasks are highly complex and require independent judgment and decision making.
2. Tasks are multiple and require independent judgment and decision making.
3. Tasks are multiple and require independent judgment and decision making.
4. Tasks are varied and require independent judgment and decision making.

*Choose number that best fits the position

Describe the nature of the job being evaluated:

5 Working Conditions

Note: This section shows in the abbreviated process.

- The **Working Conditions** section appears above the **Sections** section when selected from the **Section** options list near the bottom of the page; scroll up to complete this section.

- Under **Physical**, the toggle switches default to No. Click to select yes on those that match the position. Toggling **Other** to **Yes** will open another field for further explanation.

Select an option in the **Must carry/lift loads** field if the position requires lifting.

- Under **Mental**, the toggle switches default to No. Click to select **Yes** on those that match the position. Toggling **Other** to **Yes** will open another field for further explanation.

- Under **Environmental**, the toggle switches default to No. Click to select **Yes** on those that match the position. Toggling **Other** to **Yes** will open another field for further explanation.

- When finished, select **6 Research**.

Sections

Select the section you would like to work on.

Section: **5 Working Conditions**

- 1 Summary
- 2 Experience
- 3 Responsibilities
- 4 Duties
- 5 Working Conditions
- 6 Research
- 7 Organizational Structure
- 8 Review and Submit

Working Conditions

WORKING CONDITIONS/PHYSICAL EFFORT

To comply with the Americans with Disabilities Act of 1990 (ADA), which prohibits discrimination against qualified individuals on the basis of disability, it is necessary to specify the physical, mental and environmental conditions of the position.

a Physical

On the job the employee must:

Bend ☒ Yes	Squat ☐ No
Crawl ☐ No	Climb ☐ No
Kneel ☐ No	Sit ☒ Yes
Stand ☒ Yes	Walk ☒ Yes
Push/Pull ☐ No	Handle Object (manual dexterity) ☒ Yes
Reach above shoulder level ☒ Yes	Use fine finger movements ☒ Yes
Other ☐ No	

b Must carry/lift loads that are: 1. Light

b Mental

On the job the employee must be able to:

Read/Comprehend ☒ Yes	Write ☒ Yes
Perform calculations ☒ Yes	Communicate orally ☒ Yes
Reason ☒ Yes	Other ☐ No

c Environmental

On the job the employee:

Is exposed to excessive noise ☐ No	Is around moving machinery ☐ No
Is exposed to marked changes in temperature and/or humidity ☐ No	Is exposed to dust, fumes, gases, radiation, infections diseases, etc. ☐ No
Drives motorized equipment ☐ No	Works in confined quarters ☐ No
Other ☐ No	

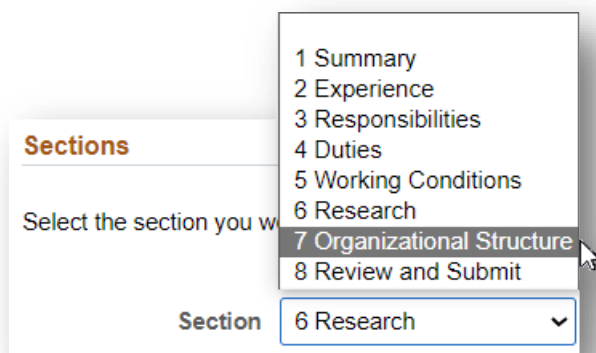
6 Research

Note: This section will show in the abbreviated process if the **Research** toggle for step 2f in the 1 Summary section is set to **Yes**.

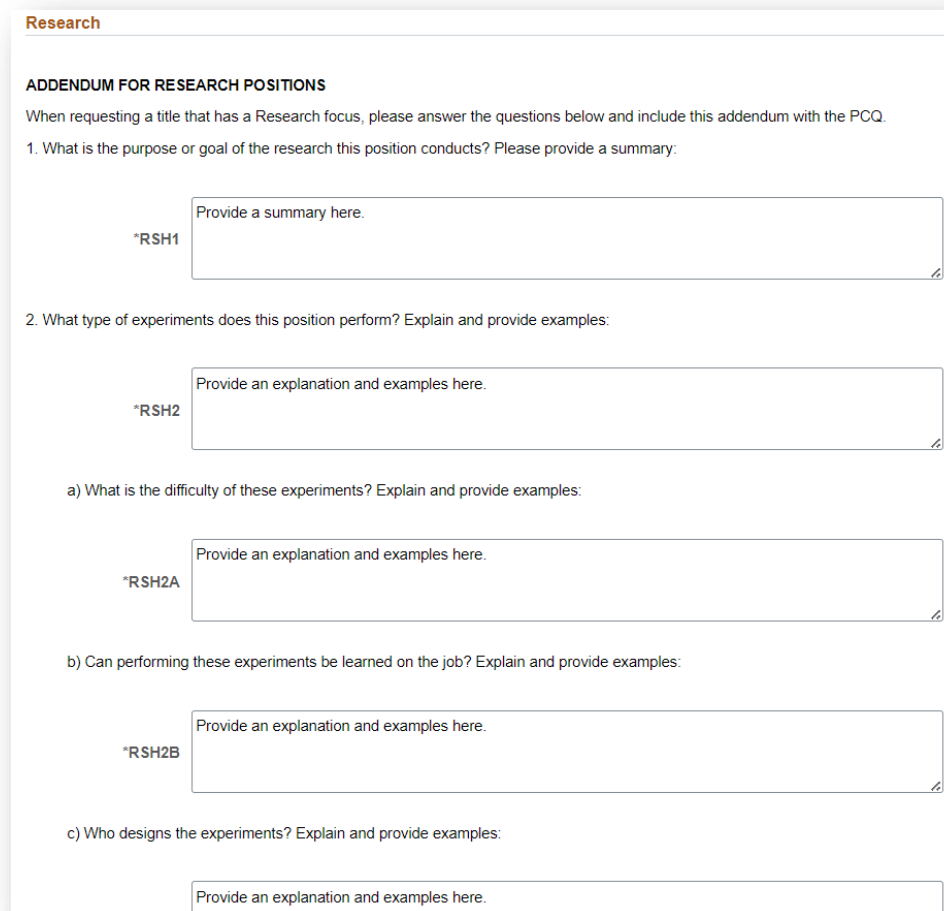
If you left the default of **No** for step 2f, nothing happens when you click Research in the **Sections** list. In that case, skip to the next topic, [7 Organizational Structure](#).

If you toggled that selection to **Yes** on step 2f, then scroll up to complete the questions.

1. The **Research** section is comprised of nine questions, some of them with follow-up questions, and all of which require information typed or copied into text boxes.
2. When finished, select **7 Organizational Structure**.



The image shows a 'Sections' dropdown menu. The menu is open, displaying a list of sections: 1 Summary, 2 Experience, 3 Responsibilities, 4 Duties, 5 Working Conditions, 6 Research, 7 Organizational Structure, and 8 Review and Submit. The '6 Research' option is highlighted with a mouse cursor. Below the dropdown, the 'Section' field shows '6 Research' with a downward arrow.



The image shows the 'Research' section of the PCQ eForm. It is titled 'Research' and 'ADDENDUM FOR RESEARCH POSITIONS'. The text states: 'When requesting a title that has a Research focus, please answer the questions below and include this addendum with the PCQ.'

1. What is the purpose or goal of the research this position conducts? Please provide a summary:

*RSH1 Provide a summary here.

2. What type of experiments does this position perform? Explain and provide examples:

*RSH2 Provide an explanation and examples here.

a) What is the difficulty of these experiments? Explain and provide examples:

*RSH2A Provide an explanation and examples here.

b) Can performing these experiments be learned on the job? Explain and provide examples:

*RSH2B Provide an explanation and examples here.

c) Who designs the experiments? Explain and provide examples:

Provide an explanation and examples here.

7 Organizational Structure

Note: This section does not show in the abbreviated process.

1. **Organizational Structure** appears above the **Sections** section when selected from the **Section** options list near the bottom of the page; scroll up to complete this section.

- a. The instructions at the top describe the **Org Chart** that you must upload as attachment in the [Review and Submit](#) topic.

- b. In the **Select Peer** column, use the **look up** button (magnifying glass icon) to select the desired peer. **Emplid**, **Empl Rcd**, **Name**, and **Title** will auto populate.

- c. Select a **Level Relative to Position Being Evaluated**.

- d. To add another peer, click the **Insert a Row** button (+ icon).

2. When finished, select **8 Review and Submit**.

Organizational Structure

Attach a current organizational chart that shows how the position being evaluated fits into the unit. Organizational charts can be simple but must clearly show the hierarchy pertaining to the position being evaluated:

- Reports to - title and name of the leader the job directly reports to
- Peers reporting to the same leader - job title(s) and employee names (or count if large #) that are peer roles.
- Direct reports - job title and names (or count if large #) of all employees that report to the position being evaluated. Indicate if the reporting position is full-time, part-time, student, regular, or temporary.

Other Peer Roles

List the closest peers to this position, including jobs in the same work area, in the same division and/or across campus. Provide the employee's name, title, and indicate whether you believe the position is at about the same level, or if it is at a higher or lower level than the position being evaluated.

Select Peer	Emplid	Empl Rcd	Name	Title	Level Relative to Position Being Evaluated	Insert A Row	Delete A Row
1		0			Lower Level		

1 row

Sections

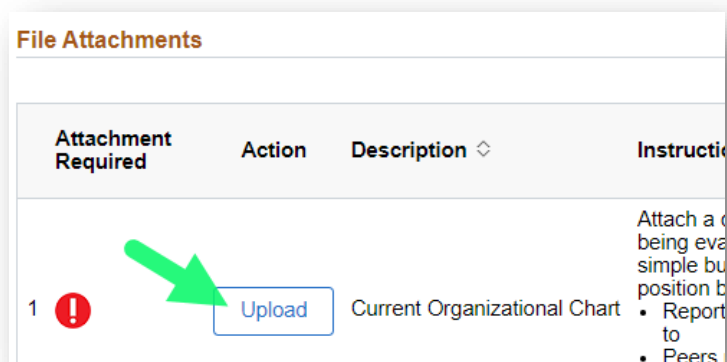
Select the section you want to evaluate

Section **7 Organizational Structure**

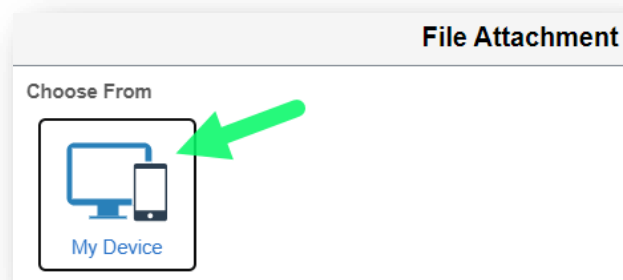
- 1 Summary
- 2 Experience
- 3 Responsibilities
- 4 Duties
- 5 Working Conditions
- 6 Research
- 7 Organizational Structure
- 8 Review and Submit

8 Review and Submit

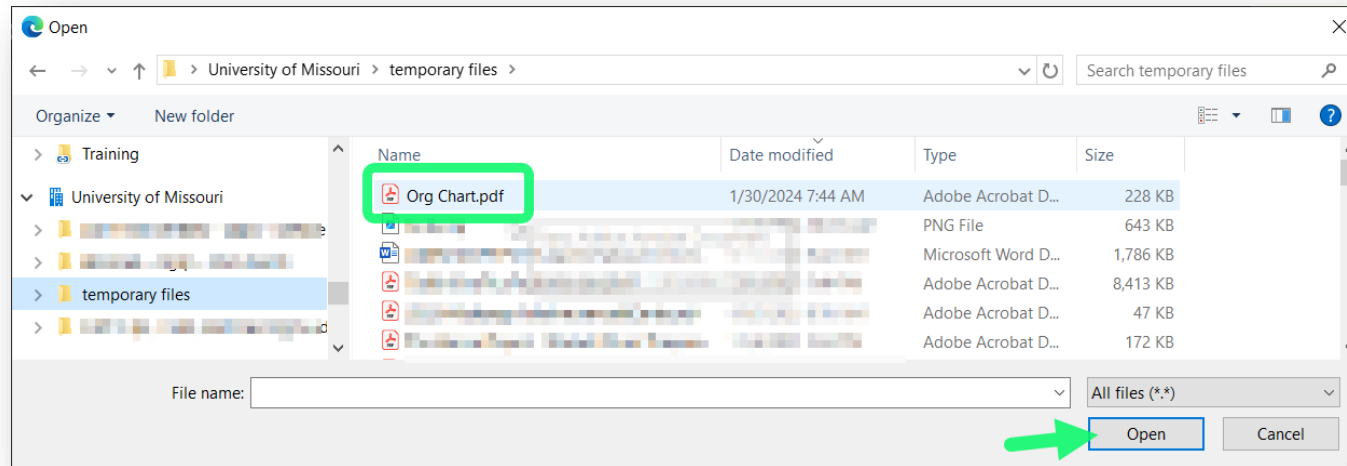
1. When you select **8 Review and Submit**, all sections open for review.
Scroll to the top of the page and review the responses you entered for the previous steps. Make any necessary changes. This is the last opportunity to make any changes to the form prior to it being submitted and entering the approval workflow.
2. You are required to upload a current Organizational Chart. Make sure you have downloaded a copy to your computer so that you can retrieve it in the next steps.
3. In the **File Attachments** section near the bottom of the page, click the **Upload** button.



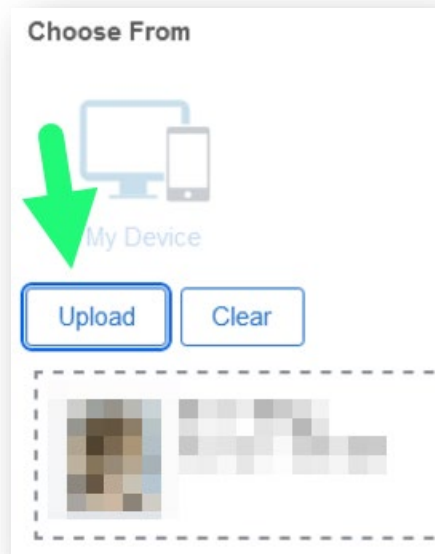
4. The **File Attachment** dialog window appears.
 - a. Click the **My Device** button.



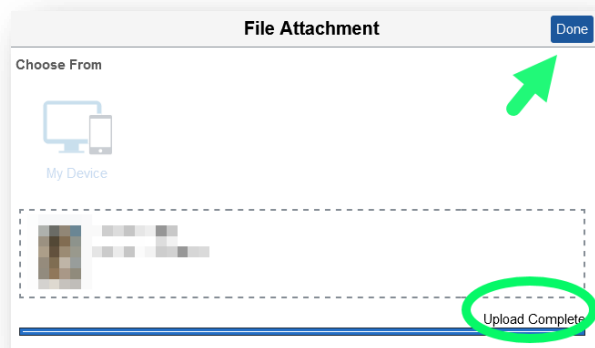
- b. The **Open** dialog window appears. Select the file that you want to upload and click the **Open** button.



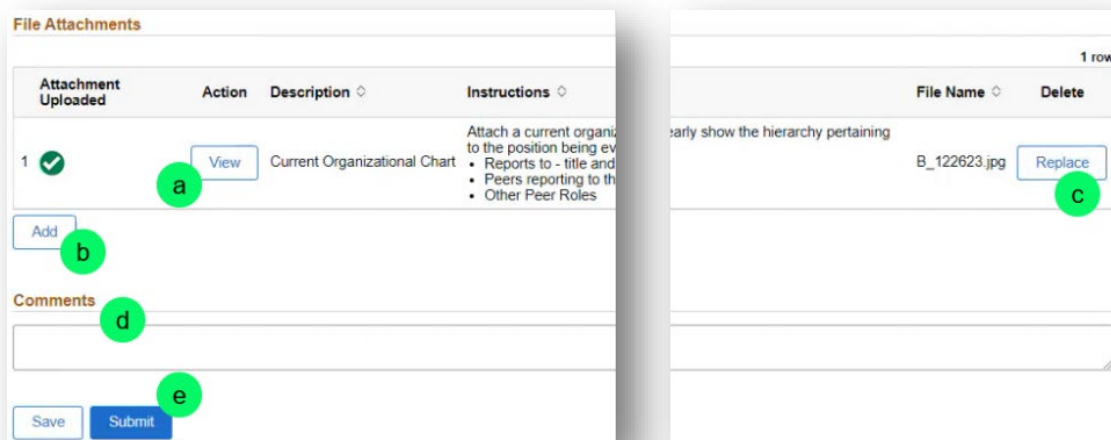
- c. The **Choose From** screen reappears, displaying your selected file. Click **Upload**.



- d. “**Complete**” appears on the right side of the upload bar when the upload finishes. Click the **Done** button.



5. The **File Attachments** section reappears.



- The Upload button is replaced with a **View** button.
- Click the **Add** button if you want to upload another document.
- Click the **Replace** button if you want to upload a replacement for the Org Chart that you previously uploaded.
- Add **Comments** if desired. Comments entered in this field will be included in the automatic email notifications that are sent at each step in the approval process and are visible to anyone who has access to the PCQ.
- If you are finished with all the sections, click the **Submit** button.

6. The **Add Position Classification Request : Confirmation** page appears.

Add Position Classification Request : Confirmation Form ID 3635851

You have successfully submitted your eForm. **a**

The eForm has been routed to the next approval step.
multiple approvers.

[View Approval Route \(Add Ad Hoc Approver\)](#) **b**

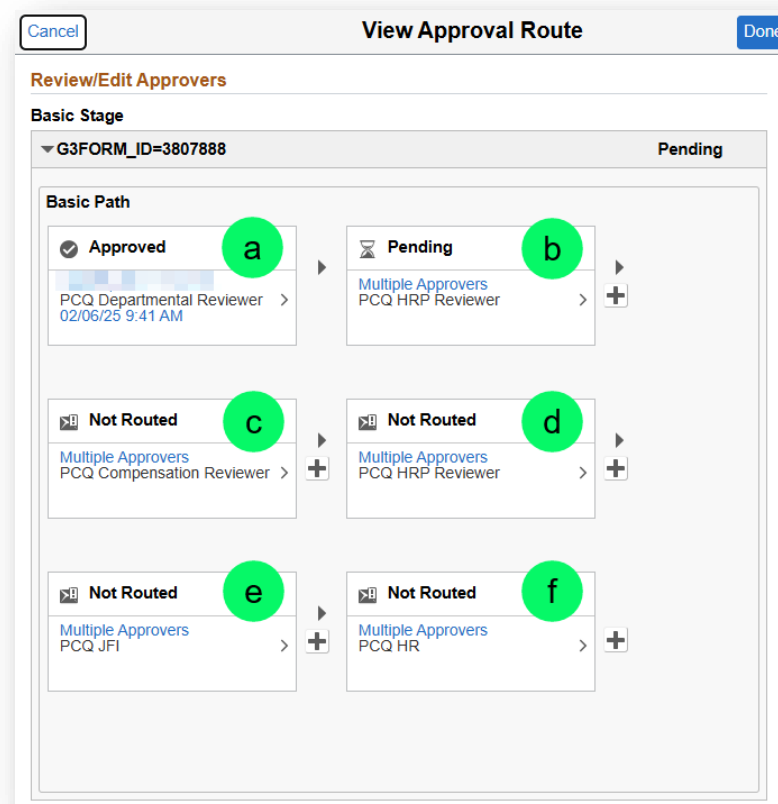
Transaction / Signature Log 1 row

	Current Date Time c	Step Title	User ID	Description	Form Action	Time Elapsed
1	04/15/2024 8:27:05AM	Initiated			Submit	

[Refresh Log](#)

- a. A confirmation message states that you've successfully submitted your eForm and that it has been routed to the next approval step.
- b. The **View Approval Route (Add Ad Hoc Approver)** button is described in the next step.
- c. The **Transaction / Signature Log** displays the first transaction. It will display other transactions as it moves through the approval process.

7. Click the **View Approval Route (Add Ad Hoc Approver)** button. The **Review/Edit Approvers** window appears.
 - a. The approval process starts with the departmental reviewer if applicable.
 - b. Next is the HR Partner reviewer.
 - c. Then it goes to the compensation reviewer if applicable.
 - d. Next it returns to the HR Partner for a second pass. This is where the HRP will have one final opportunity make any changes that they may not have done in the first HRP stop (e.g., to the proposed comp rate, pay frequency, effective date, etc.),
 - e. In this form, there's a stop for the JFI Approver who will approve the justification for increase (JFI). This stop is only included in the workflow if the existing position has one incumbent, and a pay change is being requested.
 - f. And the last stop is HR (ePAF Approver), who will do the final approval before it is loaded into the system. This stop is included in the workflow if the position has at least one incumbent.



End of Topic

Return to [Top](#).

Next Topic: [Approvers](#)

Approvers

PCQ Departmental Approver

When a PCQ eForm is submitted, an [email](#) is automatically generated and sent to the first person in the approval process. Fields on the form remain editable through all stops until after PCQ Compensation, at which time most of the fields become Read Only.

Important: If an approver is unable to finish the review for any reason, the form must be put in Hold status. Hold status is the equivalent of saving a form prior to submission. View the [Put a PCQ eForm in Hold Status](#) topic in the appendix for instructions.

The following demonstrates how the PCQ Department Reviewer steps through the process.

1. Log into [HRPRD](#).

Select the **PCQ eForms** tile from the **Processing & Administration** homepage.

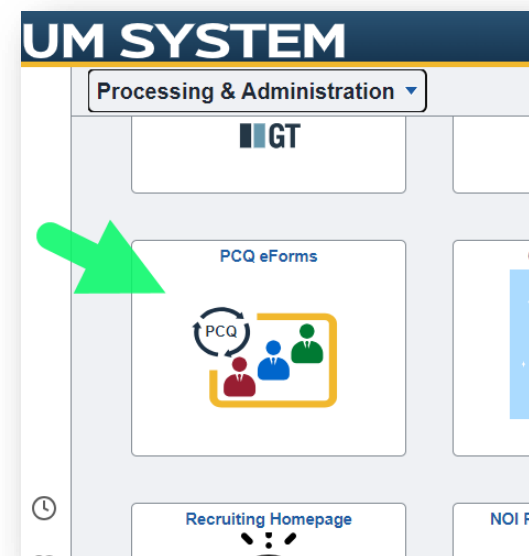
2. Click the **Evaluate a PCQ eForm** menu item.

The search fields appear.

Enter the **Form ID** that was included in the email notification.

Click the **Search** button.

(Alternatively, you can click the Search button without entering any search criteria. The Search will return all PCQ eForms that are available for your approval.)



Search by:	
Form ID	Begins With 3635851
Form Status	is Equal To
Business Unit	Begins With
CSD	Begins With
Department	Begins With
Request Type	is Equal To
Position Number	Begins With
Use Abbreviated Process?	Begins With
Recommended Job Code	Begins With
Recommended Job Title	Begins With
Supervisor Name	Begins With
Incumbent	Begins With
Search Clear	

3. The **Evaluate Position Classification Request : Position Classification Information** page for the selected eForm appears.

Read the **PURPOSE AND INSTRUCTIONS** before proceeding.

Evaluate Position Classification Request : Position Classification Information Form ID 3635851

PURPOSE AND INSTRUCTIONS

This form is designed to collect detailed information for the purpose of evaluating staff positions. As a supervisor/manager your input is very important as your answers will be used as official documentation for evaluating the job in the University's Global Grading System. You are welcome to further describe the answer to any question at the end of the form, or by attaching additional pages. Please keep the following concepts in mind as you complete the questions:

- **A current organizational chart is required.** This must contain actual classification/titles and show who the position reports to, and all direct reports to the position (if applicable). Working titles may also be provided if applicable. This can be simple or handwritten, but must be detailed enough to show how this specific position fits into the organization.
- **Describe the position as it currently exists,** not as it was in the past, or may be in the future.
- Describe the position **as it is typically conducted** over an extended period of time (e.g. year); do not describe just a particular dimension of the position or a temporary assignment.
- **Avoid understating or overstating the positions' duties and requirements.** It may be helpful to think about the responsibilities as though you were explaining the position to new staff.
- **Consider how the position would normally be performed** by the typical employee. Feel free to discuss responses with employees in the position, colleagues, or other managers.
- **If the job is currently occupied, consider the job only,** not the employee in the job.

4. In the **Position Classification Questionnaire** section:

- You can change the **Proposed Effective Date**.
- You may provide additional information in the **S1 text field**.
- You may NOT change the **Research** focus. To change it, you must recycle the form and the Initiator must make those changes.
- You may NOT change the answer to **Use Abbreviated Process**. To change it, you must recycle the form and the Initiator must make those changes.

Position Classification Questionnaire

*Proposed Effective Date 05/01/2024 **a**

Request Type Reclassify Existing Position

Position # 00015940 ADVANCEMENT DIR II

Provide additional information or special instructions here if needed.

Additional Information **b**

S1

If this position has a Research focus, set the Research field below to Yes, and complete the Addendum in the Research Section.

Research No **c**

The nonexempt and IT position classification processes must meet the following requirements in order to use the abbreviated process:

1. Position is either vacant OR has had the same incumbent for 6 months or longer;
2. Two grade change maximum (requested title is no more than a two grade change); AND
3. Proposed position must be nonexempt.

IT

1. The proposed title must be in the IT job family.

*Not to be used for the reclassification of occupied union titles.

Use Abbreviated Process? No **d**

Section 8 Review and Submit

5. The **Current Position Summary** is always read-only because you're not changing the existing information. This will not show if New Position was selected in the Summary Section (2d).

Current Position Summary

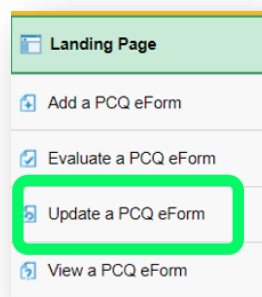
Incumbent Name	[REDACTED]	Incumbent Empl ID	[REDACTED]
Business Unit	COLUM University of MO-Columbia	Grade	012
Department	CDEVELOP Advancement	Salary	\$84,000.000000
Job Code	4104 ADVANCEMENT DIR II	Compa-Ratio	0.84
Working Title		Pay Range Minimum	\$67,745.600000
Regular/Temporary	Regular	Pay Range Midpoint	\$100,027.200000
Standard Hours	30.00	Pay Range Maximum	\$132,308.800000
Supervisor	[REDACTED]		
2nd Level Manager	[REDACTED]		

6. Review the **Proposed Position Summary**.

- The **Incumbent Experience** section and the **when, why, and how** questions are editable.
- The **Job Code**, **Working Title**, and **Proposed Standard Hours** fields in the **PROPOSED POSITION INFORMATION** section are editable.
- In the **PROPOSED INCUMBENT PAY INFORMATION** section, edit the **Hourly** or **Monthly** if needed and make updates/edits to the **Justification for Increase** field.

You may also edit the proposed comp rate at this approver level.

If 'Are you requesting a pay change?' is marked incorrectly, it can only be changed in **Update** mode. You will need to [put the form on hold](#) and access the form through **Update a PCQ eForm**.



- You may add to or change the text in the **POSITION SUMMARY** text field.

The image shows a screenshot of the 'Proposed Position Summary' form. It is divided into several sections: 'Incumbent Experience', 'PROPOSED POSITION INFORMATION', 'PROPOSED INCUMBENT PAY INFORMATION', and 'POSITION SUMMARY'. Annotations are placed on the form as follows:

- a**: A green circle and line pointing to the 'Incumbent Experience' section, which includes three text boxes for 'When duties changed', 'Why duties changed', and 'How duties changed'.
- b**: A green circle and line pointing to the 'PROPOSED POSITION INFORMATION' section, which includes fields for 'Job Code', 'Working Title', 'Proposed Standard Hours', and 'Supervisor ID'.
- c**: A green circle and line pointing to the 'PROPOSED INCUMBENT PAY INFORMATION' section, which includes a dropdown for 'Are you requesting a pay change?', a dropdown for 'Hourly or Monthly paid?', a text box for 'Proposed Comp Rate', and a text box for 'Justification for Increase'.
- d**: A green circle and line pointing to the 'POSITION SUMMARY' section, which includes a text box for 'Why the position exists'.

7. As the Department Reviewer, you may add comments in the **Departmental Reviewer Comments** field in the **Proposed Position Summary Comments** section.

Proposed Position Summary Comments

Departmental Reviewer Comments

Comments

HRP Reviewer Comments

8. In the **Key Responsibilities** section:
- You may edit the text in any of the listed **Key Responsibilities**.
 - You may edit the **% of Time*** in any row.
 - You may **Insert a Row** or **Delete a Row**.
 - *If you edit the key responsibilities, make sure the percentages add up to 100%, as displayed in the **Key Responsibility Percentage of Time Total** section. If the total does not equal 100%, an error will appear when Approve is clicked.

Key Responsibilities

List, in order of importance, specific major duties and responsibilities and estimate the average percentage of time spent on each. The following chart will assist you in estimating time percentages on an annual basis:

% of Time	Periodic Equivalencies			
	Daily	Weekly	Monthly	Yearly (annually)
5%	30 minutes	2 hours	1 day	2.5 weeks
10%	1 hour	4 hours	2 days	5 weeks
20%	2 hours	1 day	4.5 days	2.5 months

- Document the job as it is currently performed (may not match the existing job description).
- Use descriptive terms that relate to the objectives or end result of the job being performed, not the steps or tasks involved in performing the job duty or responsibility.
- Each statement should be brief and concise, beginning with an action verb. Use a separate statement for each major duty or responsibility.
- Duties or responsibilities that take less than 10% of the employee's time should not be shown as a separate statement but group with other related duties.
- Consideration should be given to breaking into smaller increments (10% or more) any duties or responsibilities that constitute 30% or more of the employee's time.
- Ensure that a task is not a restatement or overlap of any other statement.
- Review the order of importance and percentage of time.

List most important duties and responsibilities first.

	Key Responsibilities	% of Time	Insert A Row	Delete A Row
1	Type the first responsibility here.	50	+	-
2	Type the second responsibility here.	30	+	-
3	Type the third responsibility here.	20	+	-

Key Responsibility Percentage of Time Total

Total % of Time 100

9. In the **Education and Work Experience** section:
 - a. You may make changes in the **Education** section.
 - b. You may make changes in the **Experience** section.
 - c. You may add or edit the text fields in the **REQUIRED LICENSURE OR CERTIFICATION** section.
10. In the **Education and Work Experience Comments** section, you may add comments in the **Departmental Reviewer Comments** text field.

Education and Work Experience Comments

Departmental Reviewer Comments

HRP Reviewer Comments

Education and Work Experience

Education

What is the minimum amount of education and related work experience required to perform the duties of the position?

*Education Level 2. Associate's Degree

Major or related area

Equivalent Experience in Lieu of Degree Allowed? Yes

Experience

What is the minimum amount of related work experience required to perform the duties of the position satisfactorily? Indicate the type and amount of experience that will substitute separately.

Example:

- Two years of clerical experience is required. Prior experience in medical office is preferred.

Required Years of Experience 2

Prior experience here

Are there Licenses or Certification required or preferred? Yes

REQUIRED LICENSURE OR CERTIFICATION

List any licenses, registrations, certificates or other credentials that are **required** to perform the work.

Required

List any licenses, registrations, certificates or other credentials that are **preferred** to perform the work.

Preferred

11. In the **Responsibilities** section:

- a. You may make changes to the **Supervising** section.
- b. You may make changes to the **DIRECT REPORTS TO POSITION BEING EVALUATED** section.
- c. You may make changes to the “If the position being evaluated supervises others...” section.

Responsibilities

LEADERSHIP/SUPERVISORY RESPONSIBILITIES
Select the descriptions that best fits the job being evaluated

Supervising **a**
Does the position supervise

R1 ☒ Yes

Does this position supervise students only

R2 ☐ No

Supervises a group of employees who generally perform similar work

R3 ☐ No

May occasionally do the work of those supervised (< 20% of time)

R4 ☐ No

Coordinates and supervises the daily activities of a team with support and/or operations focus

R5 ☐ No

Sets priorities for the team to ensure task completion

R6 ☐ No

DIRECT REPORTS TO POSITION BEING EVALUATED: **b**
Direct Reports

Student Count Total Student FTE
Non-exempt Count Total Non-exempt FTE
Exempt Count Total Exempt FTE

Indirect Reports

Student Count Total Student FTE
Non-exempt Count Total Non-exempt FTE
Exempt Count Total Exempt FTE

If the position being evaluated supervises others, select the responsibilities below that are applicable: **c**

Recruits, screens, and interviews candidates ☐ No
Recommends candidates for hire ☐ No
Recommends salary actions ☐ No
Assigns tasks or responsibilities to others ☐ No
Monitors work performance ☐ No

Conducts performance appraisals ☐ No
Administers disciplinary action ☐ No
Recommends termination of employees ☐ No
Conducts training of others ☐ No

- d. You may make changes to the **Work leadership** section.
- e. You may make changes to the **Managing** section.
- f. You may make changes to the **Directing** section.

Work leadership **d**

Leads daily activities of a team including assigned projects or tasks

R7 ☒ Yes

Coordinates the daily activities of a small to medium-size team with a support and/or operations focus

R8 ☐ No

Managing **e**

Manages professional employees and/or supervisors

R9 ☐ No

Defines operating standards and ensures essential procedures are followed based on knowledge of own discipline

R10 ☐ No

Develops departmental plans, including business, operational and/or organizational priorities

R11 ☒ Yes

Accountable for performance and results of multiple teams

R12 ☐ No

Directing **f**

Provides leadership and direction through Managers

R13 ☒ Yes

Adapts and executes functional or departmental business plans

R14 ☐ No

Decisions are guided by organizational and functional strategies and priorities

R15 ☐ No

Accountable for performance and results for multiple functions or division

R16 ☐ No

- g. You may change the response to the “responsibility for a budget” question if the correct answer was not selected.
- h. You may change the answers in the “Does this position” section.
- i. You may change the response in the **R17** field if the correct category of fiscal responsibility was not selected.

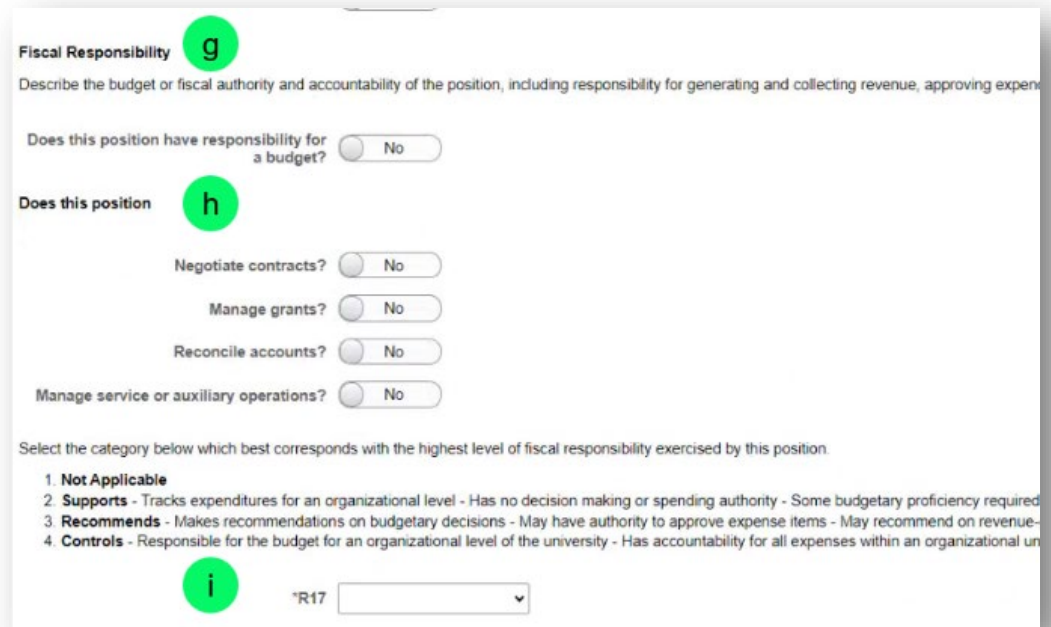
12. In the **Responsibilities Comments** section, you may enter comments in the **Departmental Reviewer Comments** text field.



Responsibilities Comments

Departmental Reviewer Comments

HRP Reviewer Comments



Fiscal Responsibility

Describe the budget or fiscal authority and accountability of the position, including responsibility for generating and collecting revenue, approving expenses, and other financial responsibilities.

Does this position have responsibility for a budget? ☐ No

Does this position

Negotiate contracts? ☐ No

Manage grants? ☐ No

Reconcile accounts? ☐ No

Manage service or auxiliary operations? ☐ No

Select the category below which best corresponds with the highest level of fiscal responsibility exercised by this position.

1. **Not Applicable**
2. **Supports** - Tracks expenditures for an organizational level - Has no decision making or spending authority - Some budgetary proficiency required
3. **Recommends** - Makes recommendations on budgetary decisions - May have authority to approve expense items - May recommend on revenue-
4. **Controls** - Responsible for the budget for an organizational level of the university - Has accountability for all expenses within an organizational unit

R17

13. In the **Duties** section:

- You may choose different responses and edit the text field in the **Independent Judgment / Problem Solving** section.
- You may choose different responses and edit the text field in the **Work Complexity** section.
- You may choose different responses and edit the text field in the **Magnitude of Impact** section.
- You may choose different responses and edit the text field in the **Internal/External Contacts** section.

14. In the **Duties Comments** section, you may add comments to the **Departmental Reviewer Comments** text field.

Duties Comments

Departmental Reviewer Comments

HRP Reviewer Comments

Duties

a

INDEPENDENT JUDGMENT / PROBLEM SOLVING
Select the description that best fits the job being evaluated (focus on position requirements not incumbent performance)

1. Performs tasks and duties under direct supervision, using well-defined policies and procedures. Work is reviewed by supervisor. Limited opportunity exists for exercising independent judgment.
2. Performs tasks and duties with occasional supervision. Occasional opportunity exists for exercising independent judgment.
3. Performs duties with independent judgment in adapting recommendations to specific situations.
4. Develops objectives and operational goals and supervises staff. Strategic problem solving of complex problems.
5. Develops strategic direction for the organization. Problem solving of complex problems.

*Choose number that best fits the position

c

MAGNITUDE OF IMPACT
Select the description that best fits the job, and provide a specific example:

1. Impact on single workgroup, department or program
2. Impact on more than one department / program
3. Impact on a division, broad range of departments or programs or multiple departments / program
4. Impact on more than one division or unit, the campus, and/or the entire university system

*Choose number that best fits the position

Provide an example to support the above selection.

The work only impacts one program.

*D4

d

INTERNAL / EXTERNAL CONTACTS
Type of contact: select the description that best fits.

1. Little or no contact with others outside own workgroup. Primary purpose of contact is to provide and/or receive routine information or documents.
2. Some contact with others outside own workgroup, such as students, general public, visitors, and/or other university employees. Primary purpose of contact is to provide or obtain explanation or interpretation of information.
3. Regular contact with others outside own workgroup, such as students, general public, visitors, and/or other university employees. Primary purpose of contact is to explain, clarify, or interpret information. May handle confidential information and some complex matters.
4. Regular and substantial contact with others outside own workgroup. Contacts usually involve discussions related to policies and programs and may include proposal or grant writing, negotiation with vendors, etc. Handles sensitive, complex, and/or confidential information.
5. High-level contact with others across the university in key positions. Contact usually involves several areas within the university and/or with community, government, business leaders, media, and dignitaries. Typically handles highly sensitive and/or confidential information.

*Choose number that best fits the position

Nature of contact: select the description that best fits.

1. Receives/provides routine information; common courtesy and ordinary tact.
2. Explains or interprets guidelines or instructions or elicits opinions; moderate tact and cooperation required.
3. Provides detailed and somewhat complex/sensitive information; contacts are non-routine and require discretion and thoughtful communication efforts.
4. Exchange of highly complex information; substantial sensitivity, discretion and cooperation required; usually follow-up action is needed.
5. Solves problems through discussion or persuasion; issues may have substantial impact on the university or be controversial, which requires high level of tact and sensitivity.

*Choose number that best fits the position

If there is routine contact with others outside of the work group, provide examples of who and the nature or context of the contact.

Provide examples here.

*D5

b

WORK COMPLEXITY
Select the description that best fits the job being evaluated (focus on position requirements not incumbent performance)

1. Tasks are highly interrelated and require a high level of coordination.
2. Tasks are multiple and require a high level of coordination.
3. Tasks are multiple and require a high level of coordination.
4. Tasks and responsibilities are varied, and requires a high level of coordination.

*Choose number that best fits the position

Describe the nature of the position's most complex, yet typical, work assignment here.

*D3

15. In the **Working Conditions** section:

- You may change any of the answers under **Physical**.
- You may change any of the answers under **Mental**.
- You may change any of the answers under **Environmental**.

Working Conditions

WORKING CONDITIONS/PHYSICAL EFFORT

To comply with the Americans with Disabilities Act of 1990 (ADA), which prohibits discrimination against qualified individuals on the basis of disability, it is necessary to specify the physical, mental and environmental conditions of the position.

a Physical

On the job the employee must:

Bend ☒ Yes ☐ No	Squat ☐ Yes ☒ No
Crawl ☐ Yes ☒ No	Climb ☐ Yes ☒ No
Kneel ☐ Yes ☒ No	Sit ☒ Yes ☐ No
Stand ☒ Yes ☐ No	Walk ☒ Yes ☐ No
Push/Pull ☐ Yes ☒ No	Handle Object (manual dexterity) ☒ Yes ☐ No
Reach above shoulder level ☒ Yes ☐ No	Use fine finger movements ☒ Yes ☐ No
Other ☐ Yes ☒ No	

Must carry/lift loads that are:

b Mental

On the job the employee must be able to:

Read/Comprehend ☒ Yes ☐ No	Write ☒ Yes ☐ No
Perform calculations ☒ Yes ☐ No	Communicate orally ☒ Yes ☐ No
Reason ☒ Yes ☐ No	Other ☐ Yes ☒ No

c Environmental

On the job the employee:

Is exposed to excessive noise ☐ Yes ☒ No	Is around moving machinery ☐ Yes ☒ No
Is exposed to marked changes in temperature and/or humidity ☐ Yes ☒ No	Is exposed to dust, fumes, gases, radiation, infections diseases, etc. ☐ Yes ☒ No
Drives motorized equipment ☐ Yes ☒ No	Works in confined quarters ☐ Yes ☒ No
Other ☐ Yes ☒ No	

16. In the **Organizational Structure** section:

The screenshot shows the 'Organizational Structure' section of the PCQ eForm. It features a table with columns: 'Select Peer', 'Emplid', 'Empl Rcd', 'Name', 'Title', 'Level Relative to Position Being Evaluated', 'Insert A Row', and 'Delete A Row'. Callout 'a' points to the 'Select Peer' dropdown menu. Callout 'b' points to the 'Level Relative to Position Being Evaluated' dropdown menu, which is currently set to 'Lower Level'. Callout 'c' points to the 'Insert A Row' (+) and 'Delete A Row' (-) buttons.

- You may change the individual selected in the **Select Peer** field.
- You may choose a different option in the **Level Relative to Position Being Evaluated**.
- You may **Insert a Row** or **Delete a Row**.

17. In the **Organizational Structure Comments** section, you may add comments to the **Departmental Reviewer Comments** text field.

The screenshot shows the 'Organizational Structure Comments' section. It contains two text input fields: 'Departmental Reviewer Comments' (highlighted with a green box) and 'HRP Reviewer Comments'.

18. In the **File Attachments** section:

- You can click the **View** button to view the Organizational Chart that was uploaded by the initiator. It will open in a new window, so you may have to direct your pop-up blocker to allow it.
- You may choose a different **Description** if the wrong description was chosen by the initiator.
- You may click the **Replace** button to replace the current document.
- You may click the **Add** button to add relevant documents.
- You may add **Comments**.
- Click the **Next** button.

The screenshot shows the 'File Attachments' section. It contains a table with columns: 'Attachment Uploaded', 'Action', 'Description', and 'Instructions'. Callout 'a' points to the 'View' button. Callout 'b' points to the 'Description' dropdown menu, which is currently set to 'Current Organizational'. Callout 'c' points to the 'Add' button. Callout 'd' points to the 'Comments' section. Callout 'e' points to the 'Comments' text input field. Callout 'f' points to the 'Next' button. Below the table, there are buttons for 'Search', 'Next', and 'Hold'.

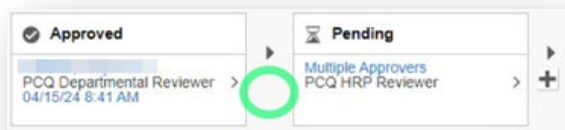
The screenshot shows the 'File Attachments' section, specifically the 'Replace' button. It displays a table with columns: 'File Name' and 'Delete'. The 'File Name' column shows 'B_122623.jpg' and the 'Delete' column shows a 'Replace' button (callout 'c').

PCQ Ad Hoc Approver

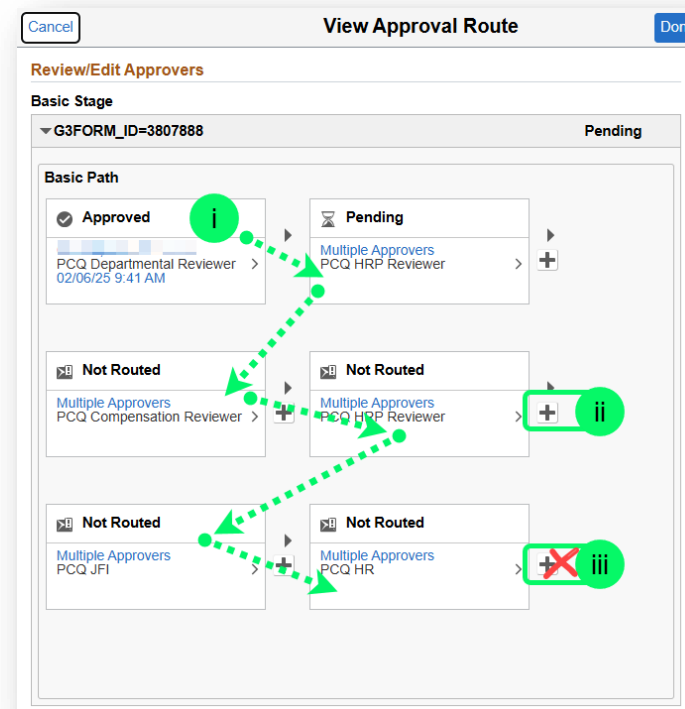
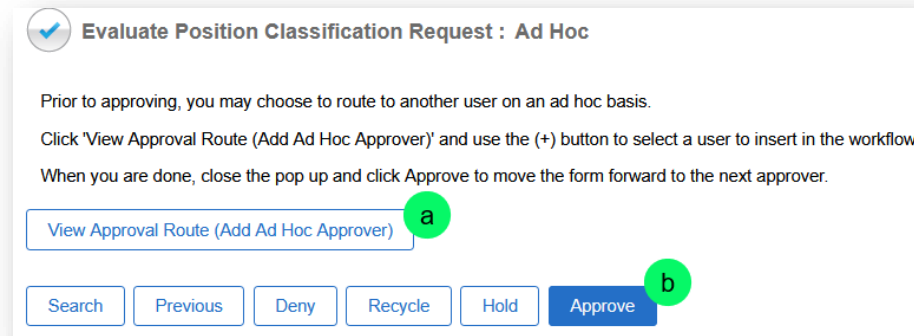
19. The **Evaluate Position Classification Request : Ad Hoc** page appears.

If your campus requires additional approvers in the workflow (e.g., a fiscal manager that needs to review the form before it goes to HRP), you may add an ad hoc approver.

Note that this is your last opportunity to add an approver between you and the next reviewer; once you approve the form, the **Add** button will disappear.

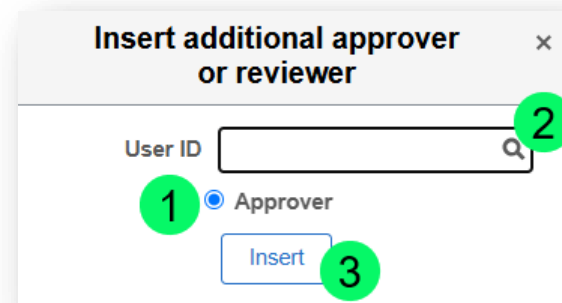
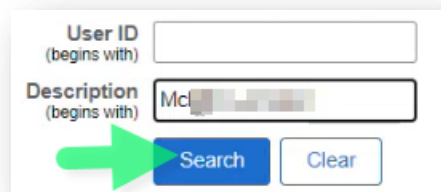


- a. Click the **View Approval Route** button.
 - i. The **Review/Edit Approvers** window appears. The approval route flows from left to right, beginning in the top row.
 - ii. Click the **Add** button that corresponds to where the ad hoc approver should be placed in the flow. For example, if the ad hoc approver should review the form *after* the PCQ Departmental Reviewer but *before* the PCQ HRP Reviewer, click the Add button that appears between the two tiles.
 - iii. **IMPORTANT:** Never add an Ad-Hoc Approver as the **LAST** approver because it will cause the form to error.

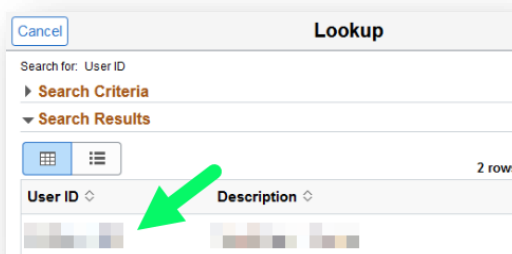


iv. The **Insert additional approver or reviewer** window appears:

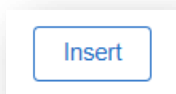
1. **Approver** is selected by default.
2. Click the **Lookup** button. The Lookup window appears. Enter search criteria (for example, enter LastName,FirstName in the Description field) and then click **Search**.



In the **Search Results**, select the appropriate user.

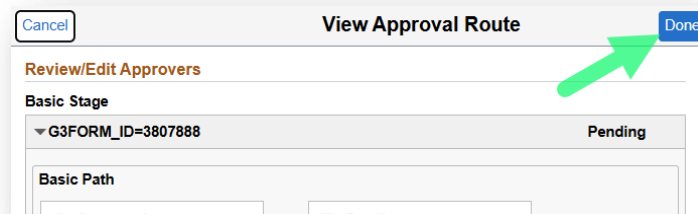


3. The **Insert additional approver or reviewer** window reappears. Click the **Insert** button.

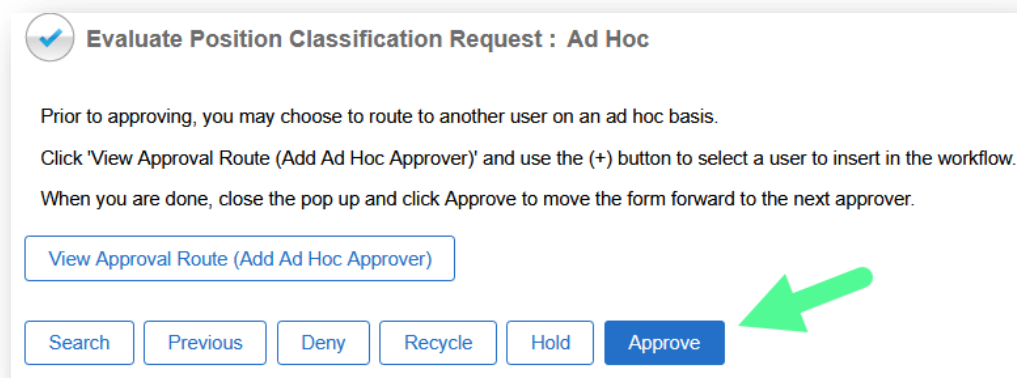


The window will close, and the tile for the new approver will appear on the **Review/Edit Approvers** window in the location where you clicked the Add button (+ sign) in a previous step.

- v. When you are finished adding Ad Hoc Approvers, click the **Done** button on the **Review/Edit Approvers** window.



- b. You are returned to the **Evaluate Position Classification Request** page. Click **Approve**.



20. The **Evaluate Position Classification Request : Confirmation** page appears.

Evaluate Position Classification Request : Confirmation

Form ID 3635851

a

You have successfully approved your eForm.
The eForm has been routed to the next approval step.
multiple approvers.

View Approval Route (Add Ad Hoc Approver)

Transaction / Signature Log

2 rows

	Current Date	Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	04/15/2024	8:27:05AM	Initiated			Submit	
2	04/15/2024	8:41:07AM	PCQ Departmental Reviewer			Approve	14 minutes

Refresh Log

- a. A message confirms that you have successfully approved your eForm, and that the eForm has been routed to the next approval step.
- b. PCQ Departmental Reviewer has been added to the **Transaction / Signature Log**,.

End of Topic
Return to [Top](#).
Next Topic: [HRP \(HR Partner\)](#)

PCQ HRP (HR Partner) Approver

The first time that the HR Partner reviews the eForm, all the same fields that are editable for the [PCQ Departmental Reviewer](#) are editable for the HRP. There are only a couple of differences, which are as follows:

In sections with fields for comment, the **Departmental Reviewer Comments** field is closed for edits, and the **HRP Reviewer Comments** field is open.

The **Final Approved Job Data** section will only appear for the HRP to complete if there is a pay change associated with the reclassification.

1. Enter or select an **Approved Effective Date**.
Be aware of this effective date in comparison to payroll confirmation dates, especially if the position is being reclassified from nonexempt to exempt.
2. Use the lookup button (magnifying glass icon) to select an **Action** code. Only available action codes are available to select.
3. Use the lookup button (magnifying glass icon) to select a **Reason** code. Only available reason codes are available to select.
4. **Compensation Rate** is read-only. If changes are needed, please update the Proposed Compensation Rate in the Proposed Position Summary section.
5. In our example, the **Earning Distribution Type** is **By Percent**.
If the person is paid in their job earnings distribution by Amount, the pay change option will not be available, because approvers do not have the ability in this form to change the amounts in the job earnings distribution. As noted on the Landing page, **“For positions with incumbents, earnings are required to be distributed “By Percent.”** If necessary, please update the incumbent’s JED row(s) from “amount” to “percent” by processing a JED Change ePAF.”

Final Approved Job Data

This is the approved information that will update position and job data. Please review for accuracy before final approval.

Action/Reason Selection
JRC/JRC should be used when reclassifying to a lower or lateral grade
PRO/RCS should be used when reclassifying to a higher grade

*Approved Effective Date 11/10/2024

*Action PRO

*Reason RCS

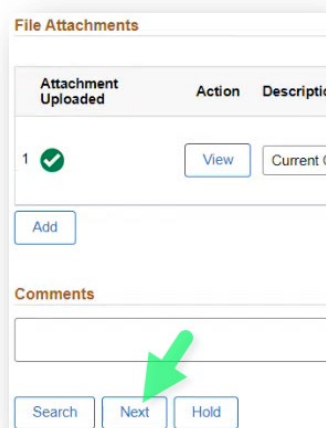
Approved Job Code 7589

Compensation Rate 25.000000

Earnings Distribution Type By Percent

For more information, view the [Add a Job Earnings Distribution \(JED\) Change](#) reference guide.

Once you've reviewed the form and made any necessary changes, including uploading any additional pertinent documentation, click the **Next** button at the bottom of the page.



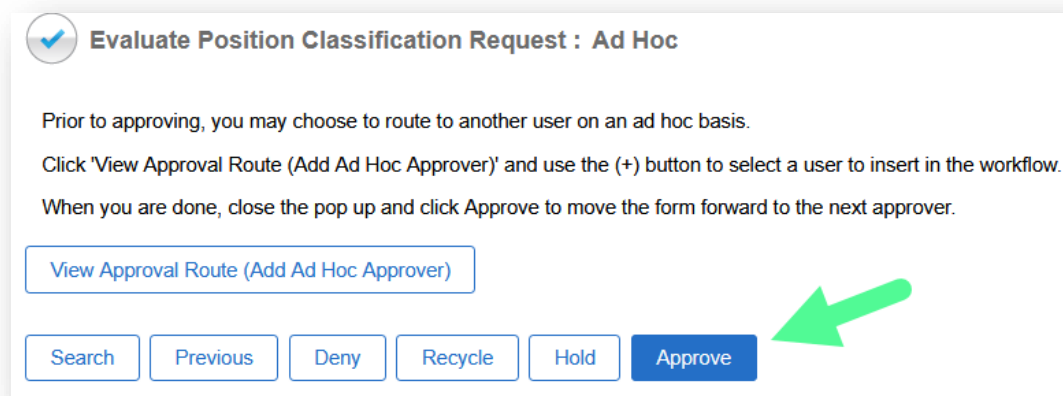
Attachment Uploaded	Action	Description
1	View	Current C

[Add](#)

Comments

[Search](#) [Next](#) [Hold](#)

If you need to add an ad hoc approver, please review the [Ad Hoc Approver step](#) in the PCQ Departmental Approver topic.



Evaluate Position Classification Request : Ad Hoc

Prior to approving, you may choose to route to another user on an ad hoc basis.

Click 'View Approval Route (Add Ad Hoc Approver)' and use the (+) button to select a user to insert in the workflow.

When you are done, close the pop up and click Approve to move the form forward to the next approver.

[View Approval Route \(Add Ad Hoc Approver\)](#)

[Search](#) [Previous](#) [Deny](#) [Recycle](#) [Hold](#) [Approve](#)

And when you're finished, click the **Approve** button.

The **Evaluate Position Classification Request : Confirmation** page appears.

A message confirms that you have successfully approved your eForm, and that the eForm has been routed to the next approval step.

PCQ HRP Reviewer has been added to the **Transaction / Signature Log**.



 **Evaluate Position Classification Request : Confirmation**

You have successfully approved your eForm.
The eForm has been routed to the next approval step.
[multiple approvers.](#)

[View Approval Route \(Add Ad Hoc Approver\)](#)

Transaction / Signature Log

	Current Date Time	Step Title
1	04/15/2024 8:27:05AM	Initiated
2	04/15/2024 8:41:07AM	PCQ Departmental Reviewer
3	04/15/2024 8:47:50AM	PCQ HRP Reviewer

[Refresh Log](#)

End of Topic

Return to [Top](#).

Next Topic: [PCQ Compensation Reviewer](#)

PCQ Compensation Approver (UM Comp Team)

When the UM Comp Team grades/evaluates the position, all the same fields on the eForm that the Departmental and HRP Approvers can edit are editable by the Comp reviewer. There are only a couple of differences, which are as follows:

Note: *If the position is non-exempt or an IT position, it will skip this PCQ Compensation Reviewer approval step.*

PROPOSED POSITION INFORMATION

In this section, the Job Code and the Proposed Standard Hours are no longer editable at this point.

The only editable field in this section is the **Working Title**.

While the PCQ Compensation Approver can't change the job code in the proposed position information, they do have their own segment where they can change the job code if they determine it needs to be changed.

Comment fields are no longer editable.

PROPOSED POSITION INFORMATION

Business Unit	COLUM University of MO-Columbia	Grade	013
Department ID	CDEVELOP Advancement	FLSA Status	Administrative
Job Code	4105 ADVANCEMENT DIR III	Hourly Rate Minimum	37.770000
Job Family	AD	Hourly Rate Midpoint	57.730000
Working Title	Working Title Here	Hourly Rate Maximum	77.690000
Regular/Temporary	Regular	Annual Rate Minimum	\$78,561.600000
Proposed Standard Hours	35.00	Annual Rate Midpoint	\$120,078.400000
Supervisor ID		Annual Rate Maximum	\$161,595.200000
Second Level Manager			

Proposed Position Summary Comments

Departmental Reviewer Comments	Comments
HRP Reviewer Comments	HRP Comments

Compensation Recommendations section

In this section, as the PCQ Compensation Approver, you can change the **Recommended Job Code**. Once done, it will not be editable for other stops in the approval chain; if the recommended job code is changed, it will change the job code in the final approved job data segment, and that's what goes to the Position and Job records in PeopleSoft.

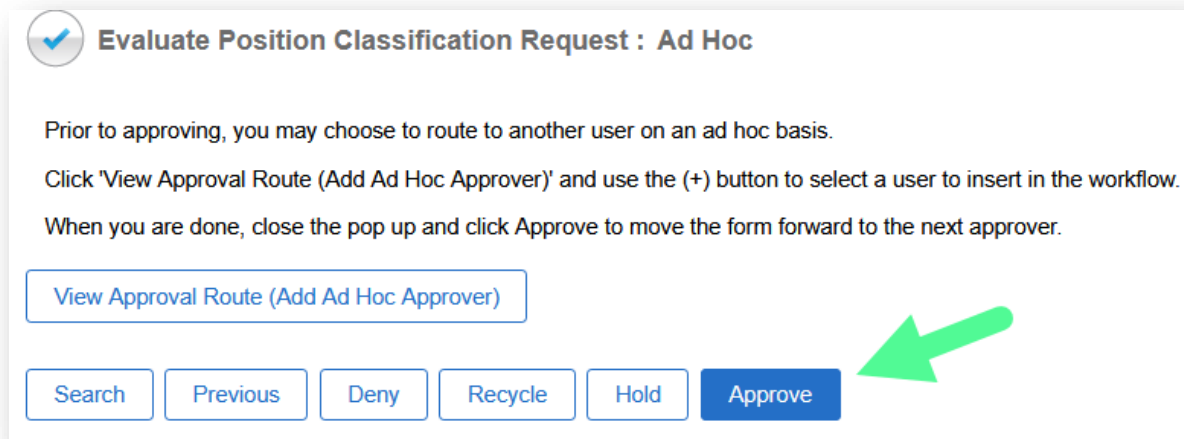
You can also add **Compensation Team Comments**, **Actual Minimum Education Required**, and **Actual Minimum Experience Required**.

The screenshot shows the 'Compensation Recommendations' section of the PCQ eForm. At the top, it displays 'Business Unit: COLUM University of MO-Columbia' and 'Incumbent: [redacted]'. Below this, it shows 'CSD: CALDV' and 'Department: CDEVELOP Advancement'. To the right, it displays 'FLSA Status: Administrative' and 'Recommended GGS Grade: 013'. The 'Recommended Job Code' field is set to '4105' with a search icon, and the text 'ADVANCEMENT DIR III' is displayed next to it. Below these fields are three text input areas: 'Compensation Team Comments:', 'Actual Minimum Education Required:', and 'Actual Minimum Experience Required:'.

Once you've reviewed the form and made any necessary changes, including uploading any additional pertinent documentation, click the **Next** button at the bottom of the page.

The screenshot shows the 'File Attachments' section of the PCQ eForm. It features a table with columns 'Attachment Uploaded', 'Action', and 'Description'. The first row shows '1' with a green checkmark, a 'View' button, and the text 'Current C'. Below the table is an 'Add' button. Underneath is a 'Comments' section with a text input field. At the bottom, there are three buttons: 'Search', 'Next' (highlighted with a green arrow), and 'Hold'.

If you need to add an ad hoc approver, please review step 19 in the [PCQ Departmental Approver](#) topic.



 **Evaluate Position Classification Request : Ad Hoc**

Prior to approving, you may choose to route to another user on an ad hoc basis.

Click 'View Approval Route (Add Ad Hoc Approver)' and use the (+) button to select a user to insert in the workflow.

When you are done, close the pop up and click Approve to move the form forward to the next approver.

[View Approval Route \(Add Ad Hoc Approver\)](#)

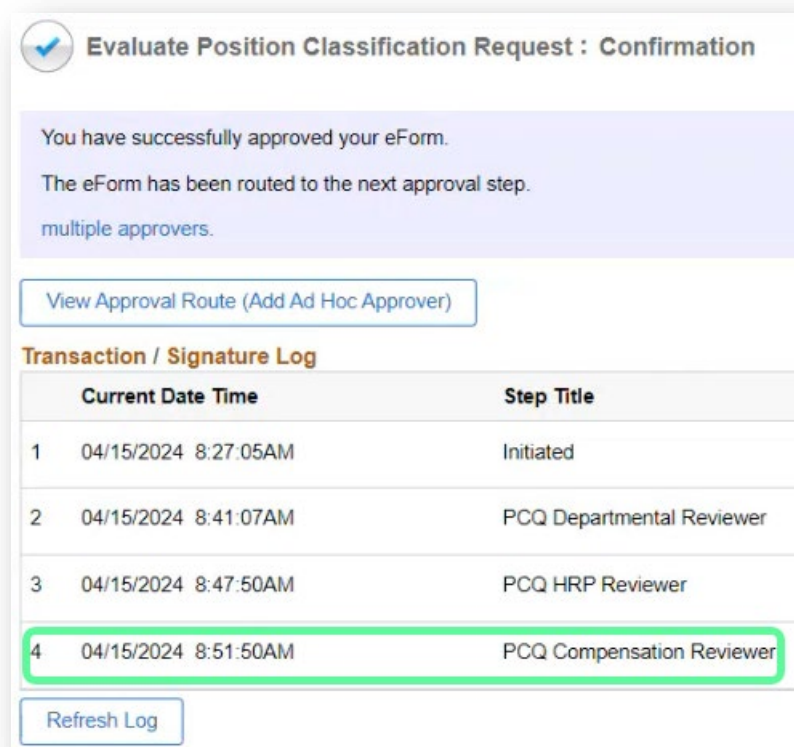
[Search](#) [Previous](#) [Deny](#) [Recycle](#) [Hold](#) [Approve](#)

And when you're finished, click the **Approve** button.

The **Evaluate Position Classification Request : Confirmation** page appears.

A message confirms that you have successfully approved your eForm, and that the eForm has been routed to the next approval step.

PCQ Compensation Reviewer has been added to the **Transaction / Signature Log**.



Evaluate Position Classification Request : Confirmation

You have successfully approved your eForm.
The eForm has been routed to the next approval step.
[multiple approvers.](#)

[View Approval Route \(Add Ad Hoc Approver\)](#)

Transaction / Signature Log

	Current Date Time	Step Title
1	04/15/2024 8:27:05AM	Initiated
2	04/15/2024 8:41:07AM	PCQ Departmental Reviewer
3	04/15/2024 8:47:50AM	PCQ HRP Reviewer
4	04/15/2024 8:51:50AM	PCQ Compensation Reviewer

[Refresh Log](#)

End of Topic

Return to [Top](#).

Next Topic: [PCQ HRP \(Second Pass\)](#)

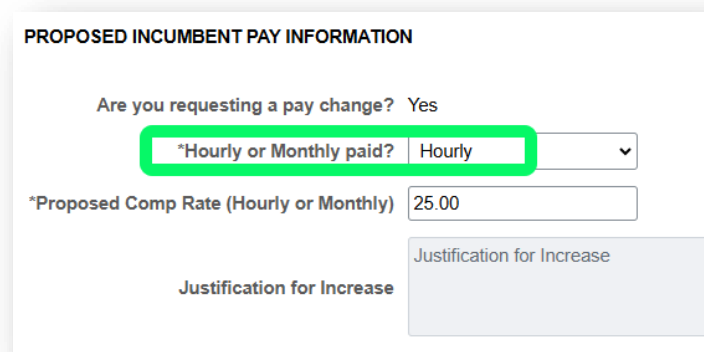
PCQ HRP (Second Pass)

At this point in the approval process, the HR Partner reviews the form a second time. The fields that were editable the first time are no longer editable except for the following:

The “Hourly or Monthly paid?” dropdown in the **PROPOSED INCUMBENT PAY INFORMATION** section is still editable because it is very important that the correct pay group is loaded.

Proposed Comp Rate is editable if a different comp rate is being requested after compensation grades the position.

The **HRP Reviewer Comments** fields are still editable.



PROPOSED INCUMBENT PAY INFORMATION

Are you requesting a pay change? Yes

*Hourly or Monthly paid? Hourly

*Proposed Comp Rate (Hourly or Monthly) 25.00

Justification for Increase



Proposed Position Summary Comments

Departmental Reviewer Comments

Comments

HRP Reviewer Comments

HRP Comments

The **Compensation Recommendations** section was not visible to the PCQ Departmental Approver or the HRP Approver before the PCQ Compensation Reviewer approved the form. Now those fields are visible, but they are not editable.

Compensation Recommendations

Business Unit: UMSYS University of MO-System	Incumbent:
CSD: AASB	FLSA Status: Nonexempt
Department: AAITSERV Admin Info Technology Svcs	Recommended GGS Grade: 006
Recommended Job Code: 4237 OFFICE SUPPORT ASSISTANT IV	
Compensation Team Comments:	
Actual Minimum Education Required:	
Actual Minimum Experience Required:	

The **Approved Effective Date, Action and Reason** in the **Final Approved Job Data** section remain editable in case, for example, the form was delayed past the initial Approved Effective Date, and it needs to be changed to a later date.

Choose the appropriate effective date based on the payroll calendar.

This will only show if a pay change is associated with the reclassification.

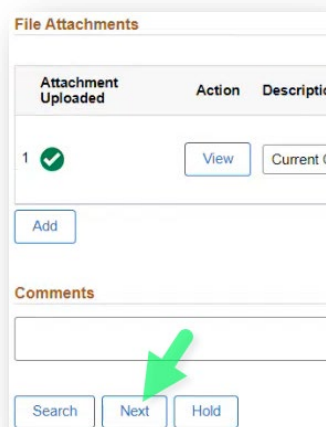
Final Approved Job Data

This is the approved information that will update position and job data. Please review for accuracy before final approval.

Action/Reason Selection
 JRC/JRC should be used when reclassifying to a lower or lateral grade
 PRO/RCS should be used when reclassifying to a higher grade

*Approved Effective Date	11/10/2024	
*Action	PRO	
*Reason	RCS	
Approved Job Code 7589		
Compensation Rate 25.000000		
Earnings Distribution Type By Percent		

Once you've reviewed the form and made any necessary changes, including uploading any additional pertinent documentation or replacing the Org Chart, click the **Next** button at the bottom of the page.



Attachment Uploaded	Action	Description
1	View	Current C

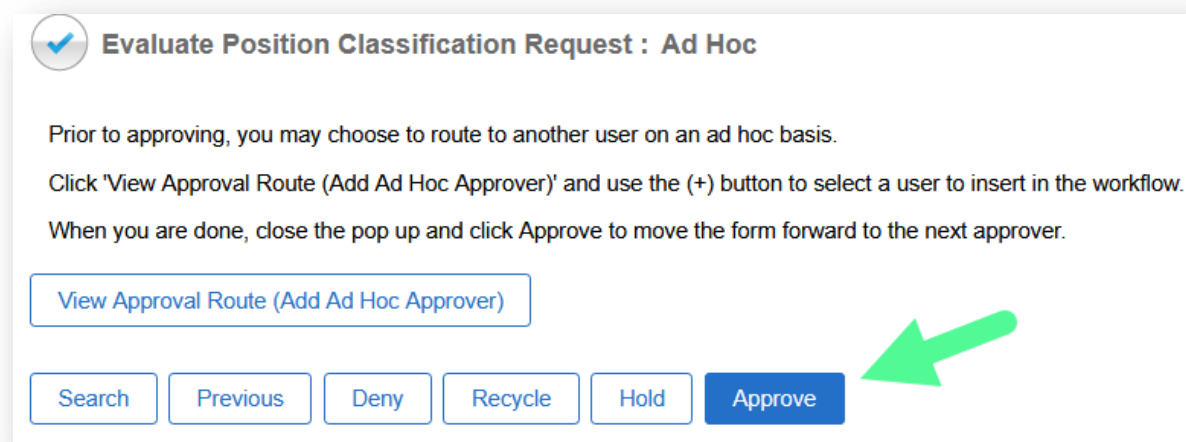
[Add](#)

Comments

[Search](#) [Next](#) [Hold](#)

The **Evaluate Position Classification Request** page appears.

If you need to add an ad hoc approver, please review step 19 in the [PCQ Departmental Approver](#) topic.



Evaluate Position Classification Request : Ad Hoc

Prior to approving, you may choose to route to another user on an ad hoc basis.

Click 'View Approval Route (Add Ad Hoc Approver)' and use the (+) button to select a user to insert in the workflow.

When you are done, close the pop up and click Approve to move the form forward to the next approver.

[View Approval Route \(Add Ad Hoc Approver\)](#)

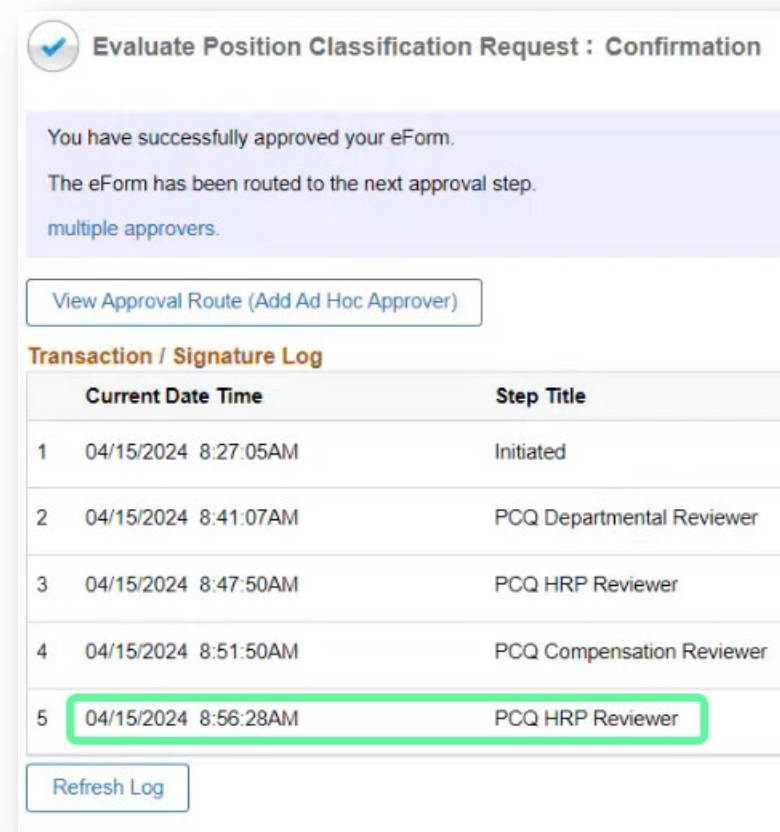
[Search](#) [Previous](#) [Deny](#) [Recycle](#) [Hold](#) [Approve](#)

And when you're finished, click the **Approve** button.

The **Evaluate Position Classification Request : Confirmation** page appears.

A message confirms that you have successfully approved your eForm, and that the eForm has been routed to the next approval step.

PCQ HRP Reviewer has been added to the **Transaction / Signature Log** (for the second time).



Evaluate Position Classification Request : Confirmation

You have successfully approved your eForm.
The eForm has been routed to the next approval step.
multiple approvers.

[View Approval Route \(Add Ad Hoc Approver\)](#)

Transaction / Signature Log

	Current Date Time	Step Title
1	04/15/2024 8:27:05AM	Initiated
2	04/15/2024 8:41:07AM	PCQ Departmental Reviewer
3	04/15/2024 8:47:50AM	PCQ HRP Reviewer
4	04/15/2024 8:51:50AM	PCQ Compensation Reviewer
5	04/15/2024 8:56:28AM	PCQ HRP Reviewer

[Refresh Log](#)

End of Topic

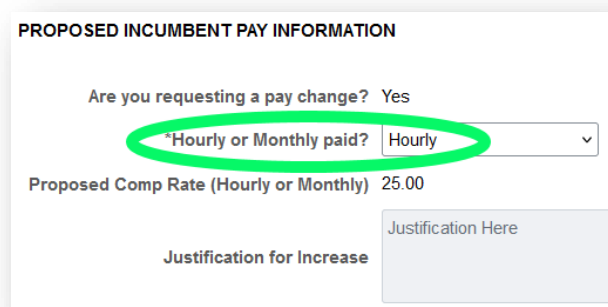
Return to [Top](#).

Next Topic: [PCQ JFI](#)

PCQ JFI Approver

As the PCQ JFI (Justification for Increase) Approver, you will find that almost every field is closed for edits, except a couple.

The “**Hourly or Monthly paid?**” field is still editable, while the proposed comp rate is not. This is because, as discussed in earlier topics, this information is so important to get right that it appears in every stage of the approval process.



PROPOSED INCUMBENT PAY INFORMATION

Are you requesting a pay change? Yes

*Hourly or Monthly paid? Hourly

Proposed Comp Rate (Hourly or Monthly) 25.00

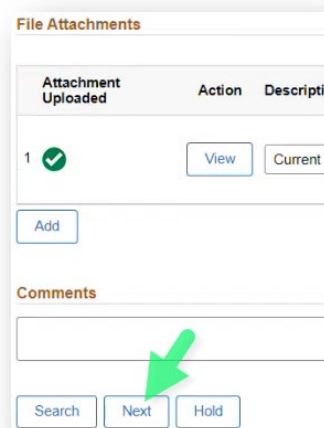
Justification for Increase

Justification Here

You can also still replace the Org Chart and/or upload additional pertinent documents.

Since you couldn't edit any comment fields in prior sections, the **Comments** field at the bottom of the page is your last opportunity to include comments.

When you're finished, click the **Next** button at the bottom of the page.



File Attachments

Attachment Uploaded	Action	Description
1 ✓	View	Current C

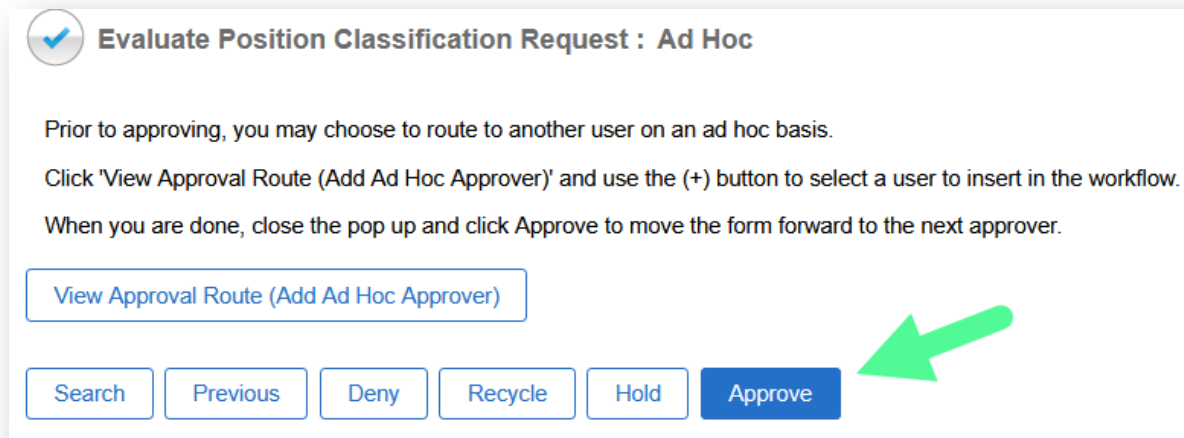
[Add](#)

Comments

[Search](#) [Next](#) [Hold](#)

The **Evaluate Position Classification Request** page appears.

If you need to add an ad hoc approver, please review step 19 in the [PCQ Departmental Approver](#) topic.



Evaluate Position Classification Request : Ad Hoc

Prior to approving, you may choose to route to another user on an ad hoc basis.

Click 'View Approval Route (Add Ad Hoc Approver)' and use the (+) button to select a user to insert in the workflow.

When you are done, close the pop up and click Approve to move the form forward to the next approver.

[View Approval Route \(Add Ad Hoc Approver\)](#)

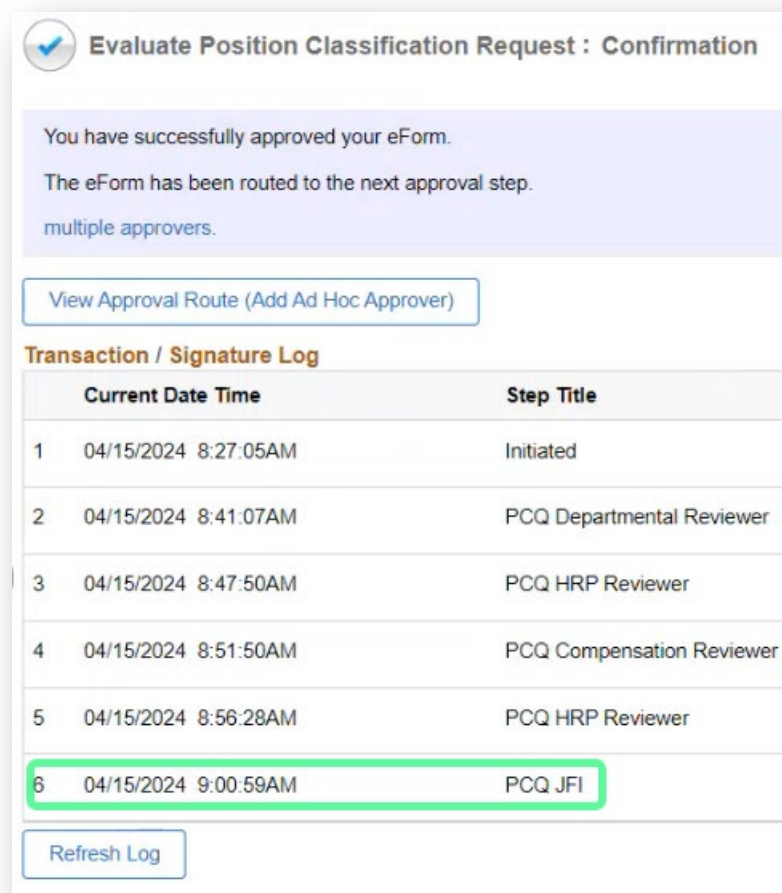
[Search](#) [Previous](#) [Deny](#) [Recycle](#) [Hold](#) [Approve](#)

And when you're finished, click the **Approve** button.

The **Evaluate Position Classification Request : Confirmation** page appears.

A message confirms that you have successfully approved your eForm, and that the eForm has been routed to the next approval step.

PCQ JFI has been added to the **Transaction / Signature Log**.



Evaluate Position Classification Request : Confirmation

You have successfully approved your eForm.
The eForm has been routed to the next approval step.
multiple approvers.

[View Approval Route \(Add Ad Hoc Approver\)](#)

Transaction / Signature Log

	Current Date Time	Step Title
1	04/15/2024 8:27:05AM	Initiated
2	04/15/2024 8:41:07AM	PCQ Departmental Reviewer
3	04/15/2024 8:47:50AM	PCQ HRP Reviewer
4	04/15/2024 8:51:50AM	PCQ Compensation Reviewer
5	04/15/2024 8:56:28AM	PCQ HRP Reviewer
6	04/15/2024 9:00:59AM	PCQ JFI

[Refresh Log](#)

End of Topic

Return to [Top](#).

Next Topic: [ePAF HR](#)

ePAF HR Approver

As the PCQ HR Approver, you will find that almost every field is closed for edits except the following:

The “**Hourly or Monthly paid?**” field is still editable. This is because, as discussed in earlier topics, this information is so important to get right that it appears in every stage of the approval process.

The fields in the **Final Approved Job Data** section (Effective Date, Action and Reason) are editable.

Final Approved Job Data

This is the approved information that will update position and job data. Please review for accuracy before final approval.

Action/Reason Selection
JRC/JRC should be used when reclassifying to a lower or lateral grade
PRO/RCS should be used when reclassifying to a higher grade

*Approved Effective Date

*Action

*Reason

Approved Job Code 7589

Compensation Rate 25.000000

Earnings Distribution Type By Percent

You can also still replace the Org Chart and/or upload additional pertinent documents.

Since you couldn't edit any comment fields in prior sections, the **Comments** field at the bottom of the page is your last opportunity to include comments.

When you're finished, click the **Next** button at the bottom of the page.

PROPOSED INCUMBENT PAY INFORMATION

Are you requesting a pay change? Yes

*Hourly or Monthly paid?

Proposed Comp Rate (Hourly or Monthly) 25.00

Justification for Increase

File Attachments

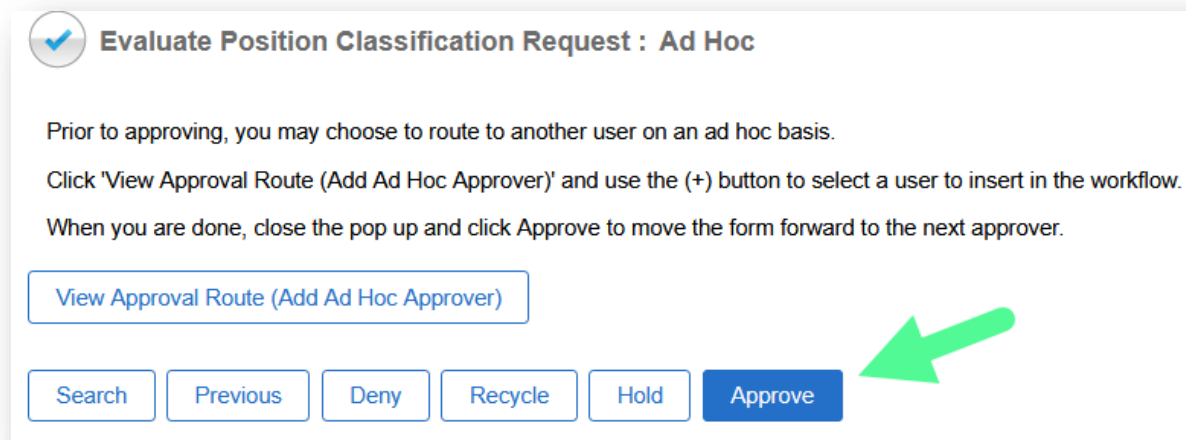
Attachment Uploaded	Action	Description
1	View	Current C

[Add](#)

Comments

[Search](#) [Next](#) [Hold](#)

The **Evaluate Position Classification Request** page appears.



Evaluate Position Classification Request : Ad Hoc

Prior to approving, you may choose to route to another user on an ad hoc basis.

Click 'View Approval Route (Add Ad Hoc Approver)' and use the (+) button to select a user to insert in the workflow.

When you are done, close the pop up and click Approve to move the form forward to the next approver.

[View Approval Route \(Add Ad Hoc Approver\)](#)

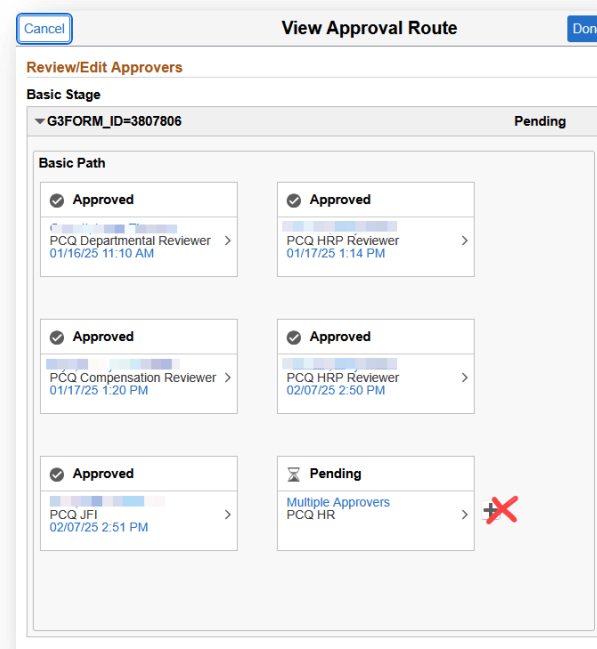
[Search](#) [Previous](#) [Deny](#) [Recycle](#) [Hold](#) [Approve](#)

Note that the **Approval Route** displays the names of each person who approved the form during the process, and that ad hoc approvers can only be added to *after* your approval.

If there is a + sign to potentially add an ad-hoc approver after the final approver, do not use it. Forms that have an ad-hoc approver as the last approver will error.

When you're finished, click the Cancel or Done button to return to the previous screen.

Then click the **Approve** button.



View Approval Route

[Cancel](#) [Done](#)

Review/Edit Approvers

Basic Stage

G3FORM_ID=3807806 Pending

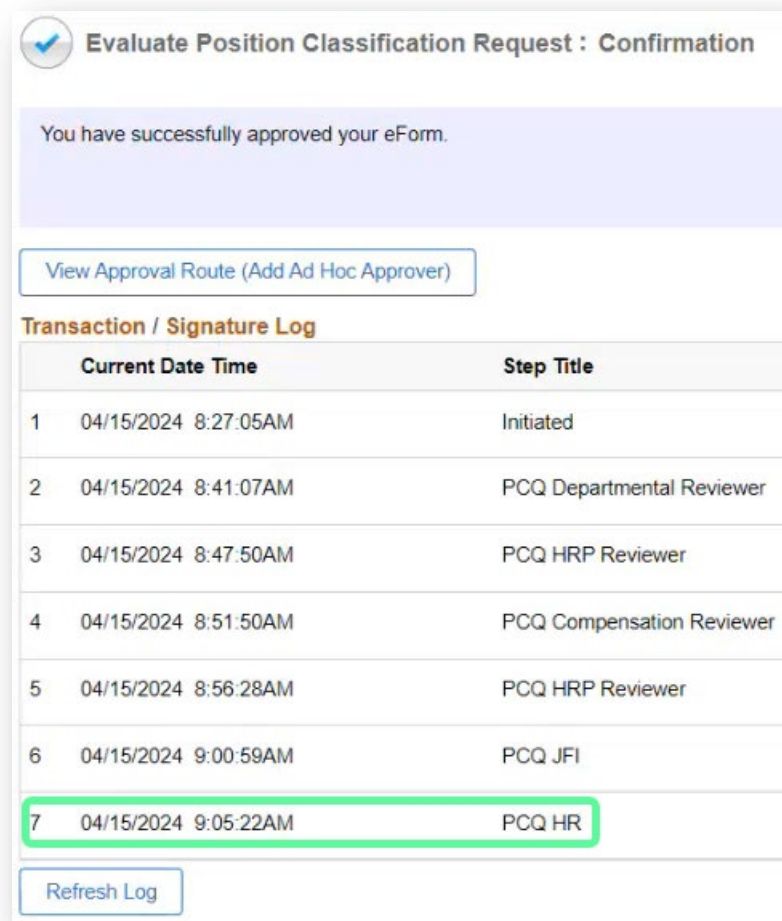
Basic Path	
Approved PCQ Departmental Reviewer 01/16/25 11:10 AM	Approved PCQ HRP Reviewer 01/17/25 1:14 PM
Approved PCQ Compensation Reviewer 01/17/25 1:20 PM	Approved PCQ HRP Reviewer 02/07/25 2:50 PM
Approved PCQ JFI 02/07/25 2:51 PM	Pending Multiple Approvers PCQ HR

The **Evaluate Position Classification Request : Confirmation** page appears.

A message confirms that you have successfully approved your eForm.

PCQ HR has been added to the **Transaction / Signature Log**.

Now the form will load the information into **Position Management** and, in the case of this example, it will also load into **Job Data**.



Evaluate Position Classification Request : Confirmation

You have successfully approved your eForm.

[View Approval Route \(Add Ad Hoc Approver\)](#)

Transaction / Signature Log

	Current Date Time	Step Title
1	04/15/2024 8:27:05AM	Initiated
2	04/15/2024 8:41:07AM	PCQ Departmental Reviewer
3	04/15/2024 8:47:50AM	PCQ HRP Reviewer
4	04/15/2024 8:51:50AM	PCQ Compensation Reviewer
5	04/15/2024 8:56:28AM	PCQ HRP Reviewer
6	04/15/2024 9:00:59AM	PCQ JFI
7	04/15/2024 9:05:22AM	PCQ HR

[Refresh Log](#)

End of Topic.

End of Training and Reference Guide.

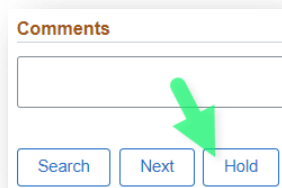
Return to [Top](#).

View [Appendix \(Email Example\)](#)

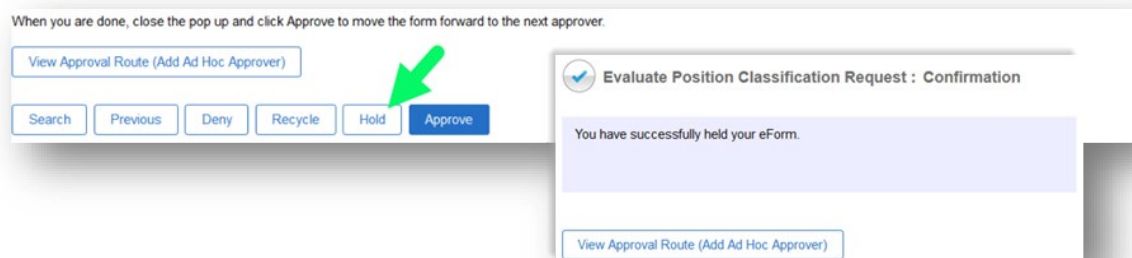
Appendix

Approvers: Put a PCQ eForm in Hold Status

If an approver needs to pause their evaluation for any reason, they must use the **Hold** button on either the PCQ eForm page or the Approval page. To resume the approval, the approver will select **Update a PCQ** and enter the Form ID or search for the form.



The Search, Next, and **Hold** buttons always appear under the **Comments** field within the PCQ eForm for Approvers when using Evaluate a PCQ eForm. The second **Hold** button appears on the approval page that loads after **Hold** is selected. A confirmation message appears when a form is successfully put on hold.



Note: Initiators do not have a hold option. See Initiators: [Save a PCQ eForm](#), the next appendix topic.

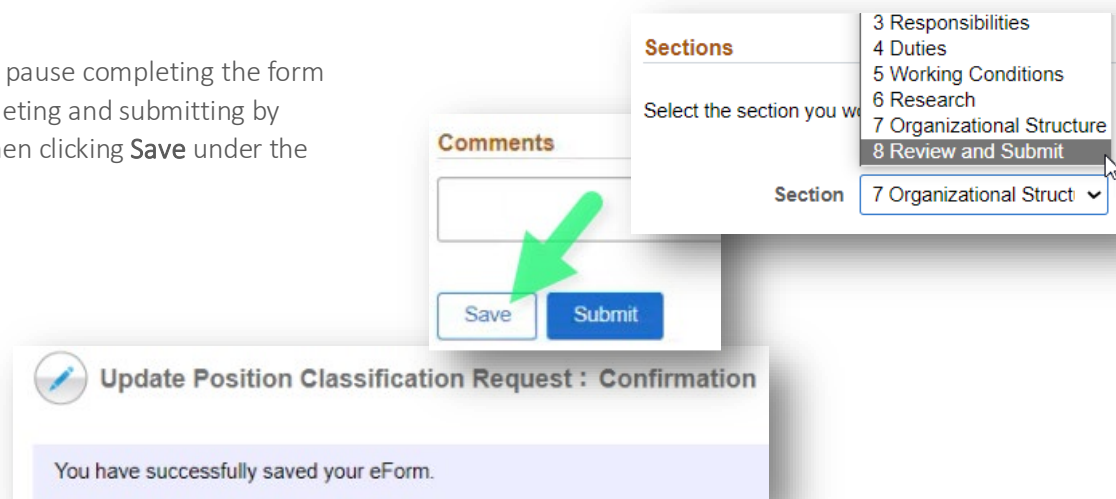
End of topic. Return to [Approvers](#) topic.

Initiators: Save a PCQ eForm

Initiators do not have a Hold option. If an initiator wishes to pause completing the form and come back later, they must save the form before completing and submitting by selecting **Review and Submit** from the **Section** menu, and then clicking **Save** under the Comments field.

The following fields are required to save a PCQ eForm:

- Position Classification Questionnaire Segment
 - Proposed Effective Date
 - Request Type
 - Position # (if request type is Reclassify Existing Position)
- Proposed Position Summary Segment
 - Business Unit
 - Department ID
 - Job Code



Additionally, the [Key Responsibility Percentage of Time Total](#) field must equal 100% or they will encounter an error. With these steps adhered to, upon saving, the **Update Position Classification Request: Confirmation** screen will confirm that the eForm has been successfully saved.

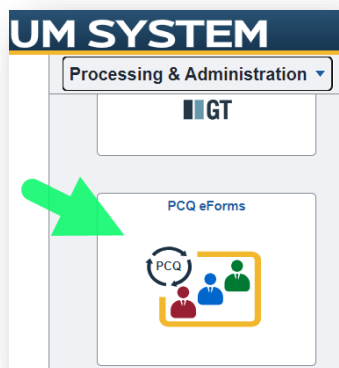
Note: The **SAVE** option is only available prior to the original form submission. Approvers must use the **HOLD** option. See [Approvers: Put a PCQ eForm in Hold Status](#), the previous appendix topic.

End of topic. Return to [Initiator](#) topic.

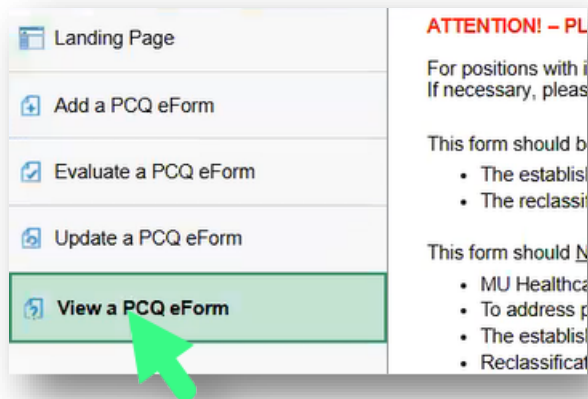
Print a PCQ eForm

The Comp Reviewer will have the ability to print forms in other statuses, but the HRP role and the PCQ JFI Approver can only print the form when it is in executed status. The following procedure steps through the process for those two roles.

1. Log into [HRPRD](#) and from either the Processing & Administration or Manager Self-Service homepage, click the **PCQ eForms** tile.

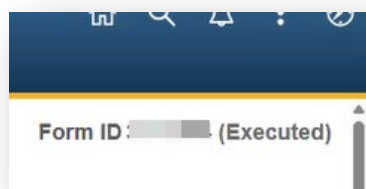


2. When the Job Eval Landing Page opens, click **View a PCQ eForm** in the menu on the left.



3. Enter the **Form ID** into its designated field and click the **Search** button.

4. The **View Position Classification Request : Position Classification Information** screen for the selected form appears. The Form ID in the upper right corner will display “Executed” if this form can be printed by the two roles referenced above.



5. Scroll to the bottom of the page and click the **Print** button.



6. The **Print Selection** dialog box appears. Expand the **Report Name** field. There are four report types: Reclass Full Form, Reclass Abbreviated Form, New Full Form, and New Abbreviated Form. Only one report type will be available for the type of form that you have selected.

In this example, only the Reclass Full Form (PCQ Rec Full) is available to select because the abbreviated process was not used when this form was created.

Select the displayed option and then click the **Print** button.

7. The selected report opens in a new browser tab.

Position Classification Questionnaire

Form ID [REDACTED] Form Status A

Proposed Effective Date 7/1/2024
Request Type REC

Position # [REDACTED] Position Description [REDACTED]
Positions Created Positions Created or Updated: (00002453)

Provide additional information or special instructions here if needed.

S1 Moving current position from leave admin to benefits with dotted line to leave. Supervisor will change to Caitlin Beal and 2nd supervisor, Carol Wilson.

If this position has a Research focus, set the Research field below to Yes, and complete the Addendum in the Research Section.

Research N

Abbreviated Process Criteria
The non-exempt and IT position classification process must meet the following requirements in order to use the abbreviated process*:

NON-EXEMPT

1. Proposed position MUST be non-exempt (new and reclassification);
2. If reclassification, the position is either vacant OR the incumbent has been performing the duties for at least six months, AND
3. Two grade change maximum (requested title is no more than a two grade change)

IT

1. The proposed title must be in the IT job family

*Not to be used for the reclassification of occupied union titles

Use Abbreviated Process? N

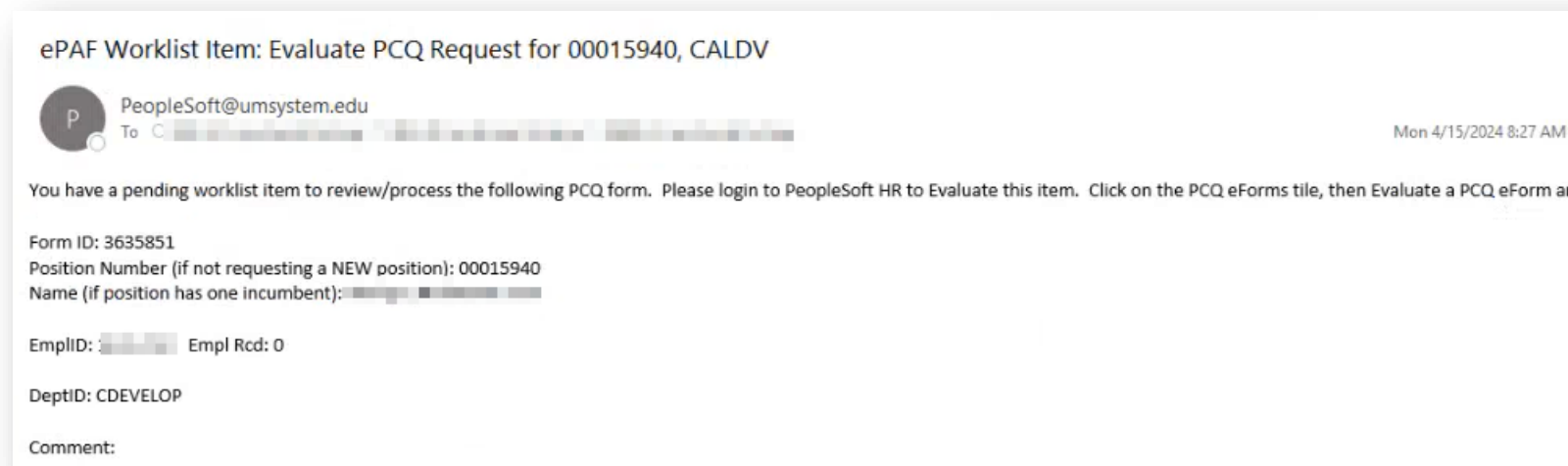
Section RVW

Current Position Summary

Incumbent Name	Incumbent Emplid
----------------	------------------

End of topic.
Return to [top](#).

Email Examples



Email Example 1: Notification to Evaluate a PCQ eForm.

ePAF Worklist Item: Evaluate PCQ Request for 00004120, CHLTH&WB

PeopleSoft@umsystem.edu

To            

You have been added as an ad-hoc approver for the following PCQ eForm. Please login to PeopleSoft HR to Evaluate this item. Click on the PCQ eForms tile, then Evaluate a PCQ eForm and search for the Form ID listed below.

PCQ Form ID: 3662791**Position Number (if not requesting a NEW position): 00004120****Name (if position has one incumbent):****EmplID: Empl Rcd: 0****DeptID: CHLTH&WB****Comments:***Email Example 2: Ad-hoc Approval Notification.*

Worklist Item: Reconsider PCQ request for 00007325, CCAMPDIN

PeopleSoft@umsystem.edu

To



The following PCQ form has been recycled and is pending in your worklist. You must decide whether to resubmit or withdraw this form. Please login to PeopleSoft HR to Update this form. Click on the PCQ eForms tile, then Update a PCQ eForm and search for the FormID listed below.

Form ID: 3481595

Position Number (if not requesting a NEW position): 00007325

Name (if position has one incumbent):

EmplID: Empl Rcd: 0

DeptID: CCAMPDIN

Comments:

Email Example 3: Notification that a PCQ eForm has been recycled back to the initiator.

Note: When the “NEW PCQ has been executed” email arrives, notify the department of what was approved.

FYI: NEW PCQ has been executed for AHRISDPT, 00090296

 PeopleSoft@umsystem.edu
To: 

For your information, final HR approval has occurred for this request. Processing is complete!

Please consult your Human Resources Partner (HRP) if you have any questions.

Form ID: 3636134

Request Type: NEW

Positions Created or Updated: (00090296)

DeptID: AHRISDPT

CSD: AHRAD

Incumbent name:

EmplID:

Empl Record: 0

Action: Reason:

Recommended Job Code: 4237

Recommended Title: OFFICE SUPPORT ASSISTANT IV

Number of positions: 1

Requested by: 

Comments:

Email Example 4: Sent to the original operator/initiator on execution of the form.

FYI: PCQ for 00024726, AMORENETDP has been denied

PeopleSoft@umsystem.edu

To: [REDACTED]

For your information, this request has been denied. This permanently ends processing of this form.

Please consult your Human Resources Partner (HRP) if you have any questions.

Form ID: 3636110

Request Type: REC

Position Number (if Reclass): 00024726

DeptID: AMORENETDP

CSD: AMORN

Incumbent Name: [REDACTED]

EmplID: [REDACTED]

Empl Record 0

Requested by: [REDACTED]

Comments:



Reply



Forward

Email Example 5: Sent to the original operator/initiator on denial of the form.

Additional Screenshots

Fiscal Responsibility

Screenshot of expanded questions from [Steps 1g and 1h in Responsibilities](#)

Fiscal Responsibility

Describe the budget or fiscal authority and accountability of the position, including responsibility for generating and collecting revenue, approving expenditures and reconciling accounts. Describe the size of the budget, extent of signature authority and involvement in the budget process.

*Budget Amount

Does this position have responsibility for a budget? ☒ Yes

Does this position

Negotiate contracts? ☒ Yes

*Explain / Provide Context

Manage grants? ☒ Yes

*Explain / Provide Context

Reconcile accounts? ☒ Yes

*Explain / Provide Context

Manage service or auxiliary operations? ☒ Yes

*Explain / Provide Context

PCQ Workflow and Updates Chart

The workflow chart reads:

1. Department or manager completes the PCQ form and submits.
2. System Routes to Dept approver.
3. Approve.
4. System Routes to HRP for approval.
5. Approve.

6. System Routes to Comp for approval, if needed.

(Non-exempt and IT jobs skip Comp step.)

NOTE: The form is fully editable up to and including this step. Once it is reviewed by Comp or moves beyond the first two approvers, limited data can be changed on the form.

7. Approve.
8. System Routes back to HRP for limited edits and approval.
9. Decision: Comp rate change for employee?

- a. Yes (proceed to step 10)
- b. No (skip to step 15)

10. System Routes to JFI Approver.

11. Approve.

12. System Routes to ePAF HR Approver.

13. Approve.

14. System adds a row into Position data AND Job data for incumbents, updating JED job code and pay rate.

Proceed to END.

15. Decision: New or Existing Position?

- a. If New, System creates new position(s). Skip to END.
- b. If Existing, proceed to step 16.

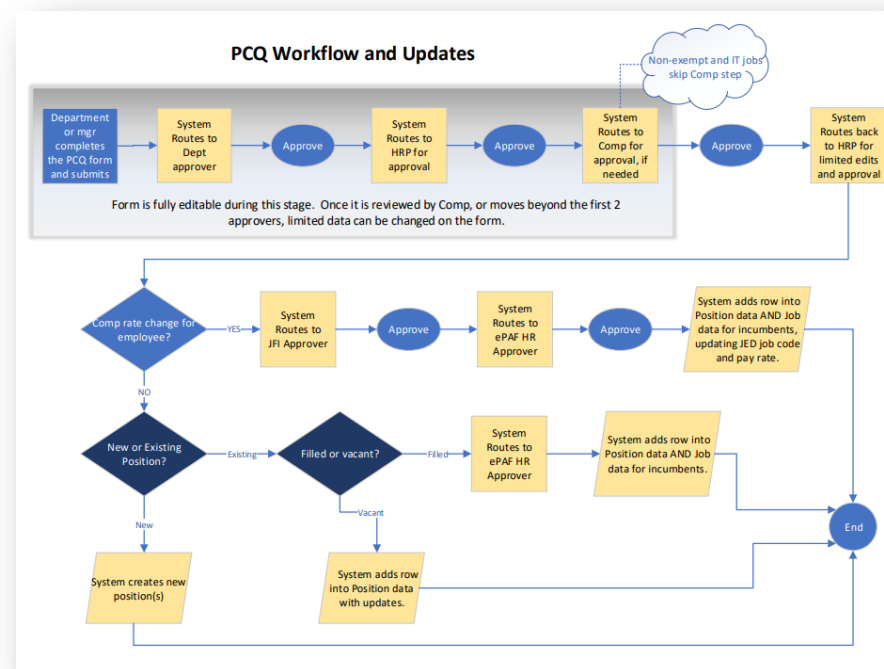
16. Decision: Filled or vacant?

- a. If Vacant, System adds row into Position data with updates. Proceed to END.
- b. If Filled, proceed to step 17.

17. System Routes to ePAF HR Approver.

18. System adds row into Position data AND Job data for incumbents.

19. END.



End of Training Guide.

Return to [top](#).