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| This form should be utilized for describing the position responsibilities and justification of a new recruitment (create and fill) or existing (refill) position. You may also use this form to request a review of an existing position. Please be as specific as possible; the information provided on this form will aide HRS Compensation in determining an appropriate job title and compensation, as well as ensuring we collectively adhere to federal regulations and University policy. |
| **Requesting Department Information** |
| Initiator Name: |       | Phone: |       | Email: |       |
| School/Central Administration: |       | Department Code: |       | Department Name: |       |
| **Justification for position –** *The justification should include 1. an explanation of the position, 2. An explanation of the unit/department. 3. business need of the position, 4. a description of how the position responsibilities are currently being fulfilled, 5. summary of consequences if the position is not filled, and 6. how the position is funded* |
| 1. Explanation of the position (be as specific as possible):
 |       |
| 1. Explanation of the unit/department (what is the mission of the unit or department that this position will serve):
 |       |
| 1. Business need (why is a new position needed):
 |       |
| 1. How are the job responsibilities currently being fulfilled (if they are divided up amongst existing staff, please indicate those staff members):
 |       |
| 1. Consequence if the position is not filled:
 |       |
| 1. Funding Source (if other, please explain):
 | State: [ ]  / Revolving: [ ]  / Grant: [ ] / Contract: [ ]  / Other: [ ]  |
| **Organizational Involvement –** *this information provides us understanding of the positions**organizational scope.* |
| 1. Who does this position report to?
 | Name:  |       |
| Title:  |       |
| 1. Will this position manage and/or supervise two or more employees (includes performance management and discipline)? If yes, please provide the names or titles of those managed or supervised.
 |       |
| 1. Will this position guide/train two or more employees but not be a direct supervisor? If yes, please provide those positions guided/ trained.
 |       |
| 1. Will this position act as a “Go-To Person” in a subject or field (not a process or system) that requires advanced professional expertise and knowledge?
 |       |
| 1. Are other current employees in this unit functioning in a similar capacity? If yes, please provide the names of those employees.
 |       |
| 1. List the internal and external clients, customers, staff, or faculty that this position interacts.
 |       |
| 1. List typical decisions, recommendations, and analysis performed by this position.
 |       |
| 1. What is this positions role in policy/procedure/processes (check all that apply)?
 | Adhere: [ ]  / Propose: [ ]  / Develop: [ ] / Implement: [ ]  / Approve: [ ]  |
| **Additional Documentation Requested** |
| An organizational chart indicating placement of this position is attached? **REQUIRED** | Yes: [ ] / No: [ ]  |
| If this position has access to confidential information, is supervising or managing employees, or a managing a program/process, the statement of facts is attached? **IF APPLICABLE** | Yes: [ ] / No: [ ]  |
| If known, please provide maximum budget available for the positions base salary | $      |
| **FLSA Duties Test** |
| 1. Will the position’s primary duties include exercise of discretion and independent judgment with respect to matters of significance? Please read below for further clarity.

In general, the exercise of discretion and independent judgment involves the comparison and the evaluation of possible courses of conduct, and acting or making a decision after the various possibilities have been considered. The exercise of discretion and independent judgment must be more than the use of skill in applying well-established techniques, procedures or specific standards described in manuals or other sources.The exercise of discretion and independent judgment implies that one has authority to make an independent choice, free from immediate direction or supervision. However, discretion and independent judgment can be exercised even if the decision or recommendation is reviewed at a higher level. Thus, the term "discretion and independent judgment" does not require that the decisions being made have to be final or free from review. The fact that one's decisions may be subject to review and that upon occasion the decisions are revised or reversed after review does not mean that one is not exercising discretion and independent judgment.Factors to consider when determining whether an employee exercises discretion and independent judgment with respect to matters of significance include, but are not limited to:[ ]  Whether the employee has authority to formulate, affect, interpret, or implement management policies or operating practices;[ ]  Whether the employee carries out major assignments in conducting the operations of the business;[ ]  Whether the employee performs work that affects business operations to a substantial degree, even if the employee's assignments are related to operation of a particular segment of the business;[ ]  Whether the employee has authority to commit the employer in matters that have significant financial impact;[ ]  Whether the employee has authority to waive or deviate from established policies and procedures without prior approval;[ ]  Whether the employee has authority to negotiate and bind the company on significant matters;[ ]  Whether the employee provides consultation or expert advice to management;[ ]  Whether the employee is involved in planning long- or short-term business objectives;[ ]  Whether the employee investigates and resolves matters of significance on behalf of management; and[ ]  Whether the employee represents the company in handling complaints, arbitrating disputes or resolving grievances.  | Yes: [ ] / No: [ ] Please indicate the % of time if “Yes”      % |
| 1. Will this position’s primary duties require direct or general supervision, and require predefined instructions, rules, and procedures to accomplish tasks and projects?
 | Yes: [ ] / No: [ ] Please indicate the % of time if “Yes”      % |
| **Proposed Position Description** – *please complete the proposed position description on the next page as specific as possible. The below notes are intended to aide you in the development of the description. Compensation will review and work with you to ensure we arrive at an accurate and well-crafted job description. Please do not hesitate to contact HRS Compensation at 6-6338 with any questions.* |
| * **Position Summary**: Provide at least 3 to 4 sentences summarizing the position, scope of work, department impact, and details on department.
* **Essential Functions:**  Provide up to 8 essential functions of the position and indicate the percentage of time performed. (Functions at or less than 5% should not be included as essential function and will be assumed as “other duties as assigned”). In describing the position, be as specific as possible in explaining what is done and how it is done. Utilize key verbs such as assist, develop, prepare, gather, lead, oversee, or implement to convey the scope and complexity of the position. Also, be clear in the function what the task is and how it is to be accomplished. For example, if they prepare financial reports, explain how that is done.
* **Preferred Minimum** **Qualifications:** Identify preferred education (degree & major), type of experience, supervisory experience, and licensure/certification.
* **Preferred Knowledge, Skills, and Abilities:** Identify preferred knowledge, skills, and abilities. These are not job duties or experience.
* **Required Minimum Qualifications and Knowledge, Skills, and Abilities:** Will be determined based upon the generic UMB job description assigned.
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| **NOTE: DOL O\*NET is a website (**[**http://www.onetonline.org/**](http://www.onetonline.org/)**) that has a large repository of descriptions. Using this website will aide you in crafting a custom job description. Search on a key word such as ‘research’ or ‘financial’ to start your position search. You may print your O\*NET description and provide it with this questionnaire.** |
| **POSITION SUMMARY (to include details on the department/unit):**      **ESSENTIAL FUNCTIONS (do not list functions that are performed less than 5% of the time, and be as descriptive as possible; please formulate complete sentences rather than a short statement)****1.**      /percentage performed     **2.**      /percentage performed     **3.**      /percentage performed     **4.**      /percentage performed     **5.**      /percentage performed     **6.**      /percentage performed     **7.**      /percentage performed     **8.**      **/**percentage performed     Other duties as assigned.**PREFERRED MINIMUM QUALIFICATIONS:**Education (type of degree, if applicable):      Type of experience:      Supervisory Experience:      License/Certification:      **PREFERRED KNOWLEDGE, SKILLS, AND ABILITIES:****1.**      **2.**      **3.**      **4.**      **5.**       |