
HR Liaison Online Position Description Services Implementation Steps

This checklist is designed to assist you (as the HR Liaison responsible for administration and maintenance of position descriptions) with successfully implementing the Online Position Description Services within your area. To use Online Position Description Services, you will need to complete four steps: Information Gathering & Review, Initial Training, Data Entry, and Departmental Communication/Training.

Step 1: Information Gathering & Review

Action to take:

1. _____ You are contacted by the HR Classification & Compensation regarding implementation. **Once implementation is initiated, Classification and Compensation will provide each department with a list of all the employees for the ADLOC. The list will include the UIN, title, e-mail and phone for each employee. An additional list will provide the names of current hiring managers or HR Liaisons who already have user accounts in the Online Employment Services.**
2. _____ Revise the list of hiring managers and HR Liaisons who should have access to review and approve Position Descriptions, as well as the list of employees who need to be set up as users. **Departments should use the lists provided to verify the accuracy of the information for each HR Liaison, hiring manager and employee. The department should indicate which employees should be designated with a hiring manager or HR Liaison account, and which should have employee accounts only. The department should verify or edit the e-mail addresses and phone numbers, and e-mail the revised list to Classification & Compensation. Classification & Compensation will then provide access to those who do not already have a user name and password, and edit the information as needed for existing users.**
3. _____ Start collecting the most updated version of the Position Description ("PD") for each employee in the department, and a current organizational chart. **For each PD you have, identify the format in which it exists (paper, Microsoft Word file, PDF file), and when it was last approved/signed. Copies of PD forms saved in Word or PDF format are typically the easiest to use when implementing. Once you have collected all the PDs and the organization chart, they can be e-mailed to the individuals assisting with implementation (whether it is HR or staff within your department).**

Step 2: Initial Training

Online PowerPoint tutorials have been developed for employees, hiring managers and for you as the HR Liaison. The employee and hiring manager tutorials were developed to assist you with understanding what each user type (HR Liaison, hiring manager, and employee) can do in the system. This will enable you have a more comprehensive understanding of the functions, and provide basic help to individuals within your area on using Online Position Description Services.

Action to Take:

1. _____ **Review the HR Liaison informational materials found at <http://employees.tamu.edu/managers/hiring/positionDescription/Default.aspx>** online. Identify if any additional HR Liaisons (or those who will temporarily have HR Liaison access) need to review the tutorials as part of the initial implementation process. Send the link to these HR Liaisons or request a special presentation or training workshop from Classification & Compensation.
2. _____ **Review the hiring manager informational materials found at <http://employees.tamu.edu/managers/hiring/positionDescription/Default.aspx>** online. Reviewing the tutorials and other materials at this link will enable you to understand what hiring managers can and cannot do within the system, and provide you better insight for the best way to accomplish training of your hiring managers.
3. _____ **Review the employee informational materials found at <http://employees.tamu.edu/employees/positions/PositionDescriptions.aspx>** online. Reviewing the tutorials and other materials at this link will enable you to understand what employees can and cannot do within the system, and provide you better insight for the best way to accomplish training of your employees.

Step 3: Data Entry

Action to take:

1. _____ Determine the appropriate contacts for any routing during implementation. **All initial updates to the PDs are routed electronically through the system to HR for final saving.**
 - a. If the PDs to be entered are current PDs that have been recently reviewed and signed as part of the performance evaluation process, **they do not need to be electronically routed to employees or hiring managers using the online system at this stage of implementation. The data entry can be completed as described in step 2 of this section, and training can be scheduled after all PDs updates have been entered and approved by HR.**
 - b. If the PDs to be entered have not been recently reviewed, **you have two options: (1) ask your hiring managers to review the PDs you collected prior to data entry in the system, so that you will be entering a current version, or (2) enter the PDs that you have already collected and schedule training for hiring managers so that they can review and update PDs after the initial update has been entered.**

2. _____ Determine the preferred data entry method for entering the PDs you have collected into the Online PD System. **The data entry will be accomplished by updating the blank PD template already in the system for each PIN. Your options for data entry include:**
 - a. Classification & Compensation student workers can begin updates to enter the PDs. **If you have collected the PDs electronically as Microsoft Word or PDF documents, you may e-mail them to hrcomp@tamu.edu. If you do not have electronic versions, send the paper versions via campus mail to Classification and Compensation at Mail Stop 1475. The originals will be returned to you once data entry is complete.**
 - b. Your departmental office support staff/students may begin updates to enter current PDs into system. **If you have collected the PDs electronically as Microsoft Word or PDF documents, you may e-mail them to the staff in your area who will be entering the PDs. Please contact Classification & Compensation to schedule a training session if the staff member(s) completing the data entry have not already attended a session on using the system.**

Step 4: Departmental Communication/Training

Action to Take:

1. _____ Identify and schedule your preferred options for training at each stage of implementation.
 - a. Live training for hiring managers and employees (RECOMMENDED): **Classification & Compensation staff can provide on-site presentations in executive staff meetings, supervisor meetings and all-department meetings, or schedule separate group training sessions at the TAMU employment office training room for those hiring managers and employees who will be creating, reviewing and approving the PDs. The presentations/training sessions can be tailored to meet your needs and time constraints. The typical hiring manager session for basic functions is 45 minutes. The typical employee training session is 30 minutes in length.**
 - b. Send employees and hiring managers an e-mail with the link to the informational website. **This approach is best used for follow-up training after a live training session has taken place. In addition, with or without live training, the department will need to provide employees and hiring managers with guidance on how they want the system used based upon the timing of implementation (i.e. is it currently the performance evaluation period, etc.) and going forward after implementation. Classification & Compensation is available to assist with reviewing draft e-mail communications and instructions before those e-mails are sent by departmental HR Liaisons. This will help ensure that accurate instructions are being distributed.**
2. _____ After all other steps are complete, contact Classification & Compensation at 845-4170 or hrcomp@tamu.edu to schedule final meeting to provide feedback and discuss ongoing user maintenance issues.

Congratulations! You have successfully completed implementation of the Online Position Description Services!