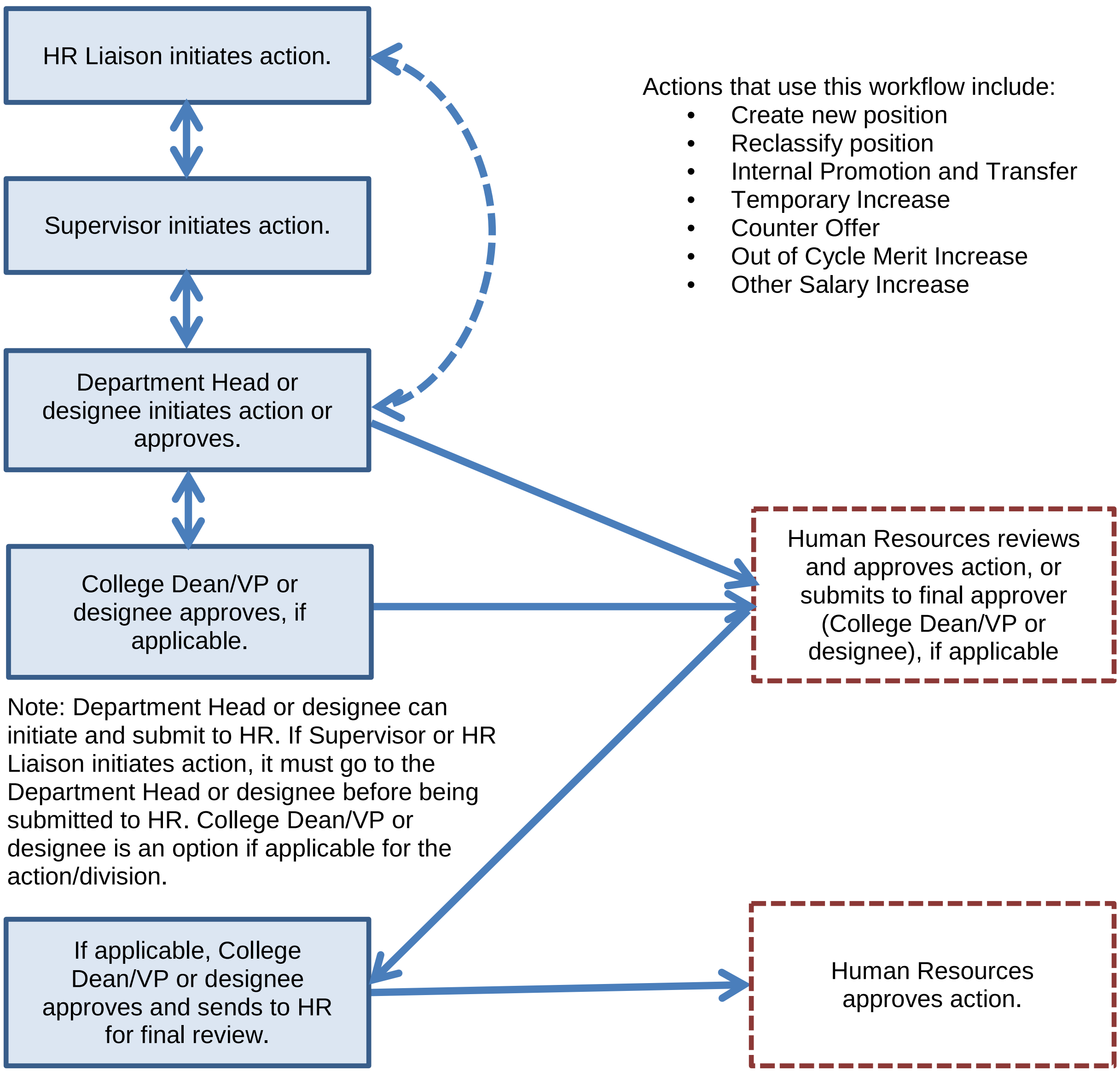
HUMAN RESOURCES
TEXAS A&M UNIVERSITY

Step-by-Step Instructions – Position and Salary Actions

NOTICE: Human Resources launched a significant upgrade to the system used to manage online employment services, and position descriptions. The system, accessed via the Single Sign On (SSO) menu as “TAMU Jobs”, was renamed **PATH** (**P**ortal **A**ccess for **T**otal **H**R) in 2013. Visit the PATH Help Page at: http://employees.tamu.edu/PATHhelp.aspx	PATH Portal Access for Total HR A one-stop shop for: Postings. Positions. Performance.

The following are instructions for most position and salary actions in the PATH system. The workflow is provided to show the approval process for these actions.

Position and Salary Actions Workflow



Actions that use this workflow include:

- Create new position
- Reclassify position
- Internal Promotion and Transfer
- Temporary Increase
- Counter Offer
- Out of Cycle Merit Increase
- Other Salary Increase

Note: Department Head or designee can initiate and submit to HR. If Supervisor or HR Liaison initiates action, it must go to the Department Head or designee before being submitted to HR. College Dean/VP or designee is an option if applicable for the action/division.

Position and Salary Actions Instructions

How to Create a New Position Description:

1. Login into the PATH System using Single Sign On (SSO) at https://sso.tamu.edu. After you have logged into SSO, select PATH from the Single Sign On menu to access the PATH system. If you need help with your UIN or password, click on "I forgot my password" on the home page of SSO, or contact Human Resources at 845-4141 or your department HR Liaison to have your SSO password reset.

2. After you have logged in, you will be taken to the Applicant Tracking home page. Hover over the down arrow next to Applicant Tracking module, and select Position Management from the drop down list to change the module. The header bar will turn orange when this is completed.

3. By default, you will appear in the Employee-PD Action user group once logged in. Click on the down arrow next to the Employee-PD Action user group and select a user group from the drop down list. Click on the **Refresh** button next to the user group to update the user. A green system message will appear at the top once the user group change has been made. To close the system message, click on the **Close** button on the far right corner of the system message.

4. To create a new position, hover over the Position Descriptions tab and select Staff from the drop down list. Click on **Create a New Position Description** button near the top of the page, and then click on New Position Description hyperlink to begin the request.

5. When creating a new position description, you may choose to select a proposed title which will populate position information into the Proposed Position Description tab. Another option is to clone an existing position description. Use the steps below to select a proposed title or clone an existing position description.

   a. Select Proposed Title – On the New Position Description page, leave the posting title field blank. The system will automatically populate the posting title into the Proposed Position Description tab. Next, select the executive/division or college and department, if needed. When finished, click on **Start Position Request** button to go to the next tab where you will select the proposed title.

   b. Clone an Existing Position Description - On the New Position Description page, leave all fields blank and select a position description to clone from the View Position Descriptions table or click on Filter these results hyperlink to search for a position description you wish to copy from. To select the position description, click on the radio button next to the position **PIN**, and then click on the orange **Start Position Request** button to go to the next tab. [NOTE: To change the department name when cloning from an existing position description, go to the **Position Request Summary** tab and click on the **Settings** link near the top of the page. Make your selection and save the change by clicking on the **Update Settings** button. This step is necessary to update the department name, when you have access to more than one department and the position that you are cloning is not in the same department.]

6. On the Title tab, select the proposed title using the instructions provided in that tab. Do not select a proposed title if you have cloned an existing position description. Click on the orange **Next** button to go to the next tab.

7. On the Action Justification tab, respond to the questions and complete all required fields. You will notice that there is an Action Type drop down field. Select "Create New" from the drop down list. This field is necessary to generate emails. When finished, click on the orange **Next** button to go to the next tab.

8. On the Proposed Position Description tab, click in the boxes to make edits and complete all required fields. The Direct Supervisor field is a user selection field that will need to be selected for each position request. Copy and paste TITLE qualifications into Position Specific qualification boxes, if existing. A cloned position description will not carry over all fields. Review and update fields as appropriate. When finished, click on the orange **Next** button to go to the next tab.

9. On the Job Duties tab, click in the boxes to edit the general summary and job duties. Complete all required fields. Use the instructional text provided in that tab to add or remove job duties. When finished, click on the orange **Next** button to go to the next tab.

10. On the Supervisor tab, you may add a hiring supervisor using the instructional text provided in that tab or leave blank if not known. Click on the orange **Next** button to go to the next tab.

11. On the Position Documents tab, attach a position document such as an organizational chart or other documentation using the instructional text provided in that tab. When finished, click on the orange **Next** button to go to the next tab.

12. On the Position Request Summary tab, review the changes made to the position request. Click on the big <u>Edit</u> hyperlink near the position title at the top of the page to edit the position request or go directly to the summary section that you want to edit by clicking on the <u>Edit</u> hyperlink in that section. When finished, transition the workflow action to another user group or submit to HR using the following steps below [NOTE: You may add this position request to your watch list by checking the checkbox before clicking on the submit button.]:

    a. **Send to Another User Group** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select the next approver to send or return to another user for review. When the Take Action box appears, select a user's name to send the request to and click on the Submit button. The user reviewing the position request may use the same steps above to review each tab, and send or return to next approver. This will be done until is it ready to be submitted to HR. Refer to the next step on how to submit the position request to HR.

    b. **Approve and Submit to HR** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position

Request and select Approve and Submit to HR (move to Submitted to HR). When the Take Action box appears, click on the **Submit** button to submit the new position to HR.

NOTE: When an action is in any workflow state other than draft, the group-member prompt (drop down list in the Take Action box) allows a user to transfer the PD action to another specific user within the same workflow state. For example, if there is more than HR Liaison who needs to review an action before it is submitted to the Department Head, the first liaison can transfer the action to the other liaison within the HR Liaison workflow state. This is done by clicking Keep Working on this Position Request link and checking the “Transfer this Position Request to” check box and then selecting the user’s name from the drop down list. The other liaison will be able to review the position and move it forward to the next approver or transfer it back. Please note, the system will not generate an email notice to the specific user since the workflow state is not changing. The liaisons transferring the action back and forth to one another within the same workflow state will need to communicate with each other when the action has been transferred for review. The current selected user is the one who can approve and send the position request to the next approver.

How to Reclassify an Existing Position Description:

1. Login into the PATH System using Single Sign On (SSO) at https://sso.tamu.edu. After you have logged into SSO, select PATH from the Single Sign On menu to access the PATH system. If you need help with your UIN or password, click on “I forgot my password” on the home page of SSO, or contact Human Resources at 845-4141 or your department HR Liaison to have your SSO password reset.

2. After you have logged in, you will be taken to the Applicant Tracking home page. Hover over the down arrow next to Applicant Tracking module, and select Position Management from the drop down list to change the module. The header bar will turn orange when this is completed.

3. By default, you will appear in the Employee-PD Action user group once logged in. Click on the down arrow next to the Employee-PD Action user group and select a user group from the drop down list. Click on the **Refresh** button next to the user group to update the user. A green system message will appear at the top once the user group change has been made. To close the system message, click on the **Close** button on the far right corner of the system message.
4. To access position descriptions, hover over the Position Descriptions tab at the top of the page, and select Staff from the drop down list to view the position descriptions that you supervise or have access to view in addition to your own position description.

5. Search for a position description that you want to reclassify using the search box or browse through the table. To select the position description, click on the hyperlink PIN. To go back and select another position description, hit the **Back** button to go to the previous page with the list of position descriptions.

6. When the position description appears, you will see a list of position actions that may be taken on the position description. Click on Reclassify Position hyperlink and then click on the **Start** button to begin the request.

7. On the Title tab, you will need to select the proposed title. Select the proposed title using the instructions provided in that tab. After you have selected the proposed title, click on the orange **Next** button to go to the next tab.

8. On the Action Justification tab, respond to the questions and complete all required fields. You will notice that there is an Action Type drop down field. Select “Reclassify” from the drop down list. This field is necessary to generate emails. When finished, click on the orange **Next** button to go to the next tab.

9. On the Proposed Position Description tab, click in the boxes to make edits and complete all required fields. The Direct Supervisor field is a user selection field that will need to be selected for each position request. Most fields will carry over from the current position description, since this is a reclassification of an existing position. Review and update fields as appropriate. Copy and paste TITLE qualifications into Position Specific qualification boxes, if existing. When finished, click on the orange **Next** button to go to the next tab.

10. On the Job Duties tab, click in the boxes to edit the general summary and job duties. Complete all required fields. Use the instructional text provided in that tab to add or remove job duties. When finished, click on the orange **Next** button to go to the next tab.

11. On the Supervisor tab, you may add a hiring supervisor using the instructional text provided in that tab or leave blank if not known. Click on the orange **Next** button to go to the next tab.

12. On the Employee tab, no changes are allowed. This tab is for Classification and Compensation use only. Click on the orange **Next** button to go to the next tab.

13. On the Position Documents tab, attach a position document such as an organizational chart or other documentation using the instructional text provided in that tab. When finished, click on the orange **Next** button to go to the next tab.

14. On the Position Request Summary tab, review the changes made to the position request. Click on the big <u>Edit</u> hyperlink near the position title at the top of the page to edit the position request or go directly to the summary section that you want to edit by clicking on the <u>Edit</u> hyperlink in that section. When finished, transition the workflow action to another user group or submit to HR using the following steps below [NOTE: You may add this position request to your watch list by checking the checkbox before clicking on the submit button.]:

    a. **Send to Another User Group** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select the next approver to send or return to another user for review. When the Take Action box appears, click on the **Submit** button to send or return the reclassification to another user group. The user group(s) reviewing the position request may use the same steps above to review each tab, and send or return to next approver. This will be done until is it ready to be submitted to HR. Refer to the next step on how to submit the position request to HR.

    b. **Approve and Submit to HR** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select Approve and Submit to HR (move to Submitted to HR). When the Take Action box appears, click on the **Submit** button to submit the reclassification to HR.

NOTE: When an action is in any workflow state other than draft, the group-member prompt (drop down list in the Take Action box) allows a user to transfer the PD action to another specific user within the same workflow state. For example, if there is more than HR Liaison who needs to review an action before it is submitted to the Department Head, the first liaison can transfer the action to the other liaison within the HR Liaison workflow state. This is done by clicking Keep Working on this Position Request link and checking the “Transfer this Position Request to” check box and then selecting the user’s name from the drop down list. The other liaison will be able to review the position and move it forward to the next approver or transfer it back. Please note, the system will not generate an email notice to the specific user since the workflow state is not changing. The liaisons transferring the action back and forth to one another within the same workflow state will need to communicate with each other when the action has been transferred for review. The current selected user is the one who can approve and send the position request to the next approver.

How to Request a Counter Offer:

1. Login into the PATH System using Single Sign On (SSO) at https://sso.tamu.edu. After you have logged into SSO, select PATH from the Single Sign On menu to access the PATH system. If you need help with your UIN or password, click on “I forgot my password” on the home page of SSO, or contact Human Resources at 845-4141 or your department HR Liaison to have your SSO password reset.

2. After you have logged in, you will be taken to the Applicant Tracking home page. Hover over the down arrow next to Applicant Tracking module, and select Position Management from the drop down list to change the module. The header bar will turn orange when this is completed.

3. By default, you will appear in the Employee-PD Action user group once logged in. Click on the down arrow next to the Employee-PD Action user group and select a user group from the drop down list. Click on the **Refresh** button next to the user group to update the user. A green system message will appear at the top once the user group change has been made. To close the system message, click on the **Close** button on the far right corner of the system message.

4. To access position descriptions, hover over the Position Descriptions tab at the top of the page, and select Staff from the drop down list to view the position descriptions that you supervise or have access to view in addition to your own position description.

5. Search for a position description that you want to request a counter offer using the search box or browse through the table. To select the position description, click on the hyperlink PIN. To go back and select another position description, hit the **Back** button to go to the previous page with the list of position descriptions.

6. When the position description appears, you will see a list of position actions that may be taken on the position description. Click on Counter Offer Action hyperlink and then click on the **Start** button to begin the request.

7. On the Action Justification tab, respond to the questions and complete all required fields. You will notice that there is an Action Type drop down field. Select “Counter Offer” from the drop down list. This field is necessary to generate emails. When finished, click on the orange **Next** button to go to the next tab.

8. The Current Position Description tab is a read only copy of the position description. You may review the current position description and click on the orange **Next** button to go to the next tab.

9. The Job Duties tab is a read only copy of the general summary and job duties. You may review that information and click on the orange **Next** button to go to the next tab.

10. On the Supervisor tab, no changes are allowed. This tab is for Classification and Compensation use only. Click on the orange **Next** button to go to the next tab.

11. On the Employee tab, no changes are allowed. This tab is for Classification and Compensation use only. Click on the orange Next button to go to the next tab.

12. On the Position Documents tab, attach a position document using the instructional text provided in that tab. When finished, click on the orange **Next** button to go to the next tab.

13. On the Position Request Summary tab, review the information added to the position request. Click on the big <u>Edit</u> hyperlink near the position title at the top of the page to edit the position request or go directly to the summary section that you want to edit by clicking on the <u>Edit</u> hyperlink in that section. When finished, transition the workflow action to another user group or submit to HR using the following steps below [NOTE: You may add this position request to your watch list by checking the checkbox before clicking on the submit button.]:

    a. **Send to Another User Group** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select the next approver to send or return to another user for review. When the Take Action box appears, click on the **Submit** button to send or return the counter offer to another user group. The user group(s) reviewing the position request may use the same steps above to review each tab, and send or return to next approver. This will be done until is it ready to be submitted to HR. Refer to the next step on how to submit the position request to HR.

    b. **Approve and Submit to HR** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select Approve and Submit to HR (move to Submitted to HR). When the Take Action box appears, click on the **Submit** button to submit the counter offer to HR.

    NOTE: When an action is in any workflow state other than draft, the group-member prompt (drop down list in the Take Action box) allows a user to transfer the PD action to another specific user within the same workflow state. For example, if there is more than HR Liaison who needs to review an action before it is submitted to the Department Head, the first liaison can transfer the action to the other liaison within the HR Liaison workflow state. This is done by clicking <u>Keep Working on this Position Request</u> link and checking the "Transfer this Position Request to" check box and then selecting the user's name from the drop down list. The other liaison will be able to review the position and move it forward to the next approver or transfer it back. Please note, the system will not generate an email notice to the specific user since the workflow state is not changing. The liaisons transferring the action back and forth to one another within the same workflow state will need to communicate with each other when the action has been transferred for review. The current selected user is the one who can approve and send the position request to the next approver.

How to Request an Internal Promotion and Transfer:

1. Login into the PATH System using Single Sign On (SSO) at https://sso.tamu.edu. After you have logged into SSO, select PATH from the Single Sign On menu to access the PATH system. If you need help with your UIN or password, click on “I forgot my password” on the home page of SSO, or contact Human Resources at 845-4141 or your department HR Liaison to have your SSO password reset.

2. After you have logged in, you will be taken to the Applicant Tracking home page. Hover over the down arrow next to Applicant Tracking module, and select Position Management from the drop down list to change the module. The header bar will turn orange when this is completed.

3. By default, you will appear in the Employee-PD Action user group once logged in. Click on the down arrow next to the Employee-PD Action user group and select a user group from the drop down list. Click on the **Refresh** button next to the user group to update the user. A green system message will appear at the top once the user group change has been made. To close the system message, click on the **Close** button on the far right corner of the system message.

4. To access position descriptions, hover over the Position Descriptions tab at the top of the page, and select Staff from the drop down list to view the position descriptions that you supervise or have access to view in addition to your own position description.

5. Search for the vacant position description that you want to request an internal promotion or internal transfer using the search box or browse through the table. To select the position description, click on the hyperlink PIN. To go back and select another position description, hit the **Back** button to go to the previous page with the list of position descriptions.

6. When the position description appears, you will see a list of position actions that may be taken on the position description. Click on Internal Promotion and Transfer hyperlink and then click on the **Start** button to begin the request.

7. On the Action Justification tab, respond to the questions and complete all required fields. You will notice that there is an Action Type drop down field. Select “Internal Promotion and Transfer” from the drop down list. This field is necessary to generate emails. When finished, click on the orange **Next** button to go to the next tab.

8. The Vacant Position Description tab is a read only copy of the position description. You may review the position description and click on the orange **Next** button to go to the next tab.

9. The Vacant Position Job Duties tab is a read only copy of the general summary and job duties. You may review the general summary and job duties and click on the orange **Next** button to go to the next tab.

10. On the Proposed Employee Information tab, you will enter information about the employee being proposed for promotion or transfer. Complete all required fields. When finished, click on the orange **Next** button to go to the next tab.

11. On the Supervisor tab, no changes are allowed. This tab is for Classification and Compensation use only. Click on the orange **Next** button to go to the next tab.

12. On the Position Documents tab, attach a position document using the instructional text provided in that tab. When internally promoting or transferring an employee into a vacant position you will need to send a Criminal Background Check Request Form to Recruitment and Workforce Planning. A signed Verification of Degree(s) and/or Licensure Release Form will be needed, if the position requires a degree and/or licensure and candidate claims to have a degree and/or licensure. If the candidate does not have a degree and/or licensure, no verification of degree and/or licensure form is needed. Do not send through email. When finished, click on the orange **Next** button to go to the next tab.

13. On the Position Request Summary tab, review the information added to the position request. Click on the big Edit hyperlink near the position title at the top of the page to edit the position request or go directly to the summary section that you want to edit by clicking on the Edit hyperlink in that section. When finished, transition the workflow action to another user group or submit to HR using the following steps below [NOTE: You may add this position request to your watch list by checking the checkbox before clicking on the submit button.]:

    a. **Send to Another User Group** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select the next approver to send or return to another user for review. When the Take Action box appears, click on the **Submit** button to send or return the other salary increase to another user group. The user group(s) reviewing the position request may use the same steps above to review each tab, and send or return to next approver. This will be done until is it ready to be submitted to HR. Refer to the next step on how to submit the position request to HR.

    b. **Approve and Submit to HR** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select Approve and Submit to HR (move to Submitted to HR). When the Take Action box appears, click on the **Submit** button to submit the other salary increase to HR.

    NOTE: When an action is in any workflow state other than draft, the group-member prompt (drop down list in the Take Action box) allows a user to transfer the PD action to another specific user within the same workflow state. For example, if there is more than HR Liaison who needs to review an action before it is submitted to the Department Head, the first liaison can transfer the action to the other liaison within the HR Liaison workflow state. This is done by clicking Keep Working on this Position Request link and checking the "Transfer this Position Request to" check box and then selecting the user's name from the drop down list. The other liaison will be able to review the position and move it forward to the next approver or transfer it back. Please note, the system will not generate an email notice to the specific user since the workflow state is not changing. The liaisons transferring the action back and forth to one another within the same workflow state will need to communicate with each other when the action has been transferred for review. The current selected user is the one who can approve and send the position request to the next approver.

How to Request an Other Salary Increase:

1. Login into the PATH System using Single Sign On (SSO) at https://sso.tamu.edu. After you have logged into SSO, select PATH from the Single Sign On menu to access the PATH system. If you need help with your UIN or password, click on "I forgot my password" on the home page of SSO, or contact Human Resources at 845-4141 or your department HR Liaison to have your SSO password reset.

2. After you have logged in, you will be taken to the Applicant Tracking home page. Hover over the down arrow next to Applicant Tracking module, and select Position Management from the drop down list to change the module. The header bar will turn orange when this is completed.

3. By default, you will appear in the Employee-PD Action user group once logged in. Click on the down arrow next to the Employee-PD Action user group and select a user group from the drop down list. Click on the **Refresh** button next to the user group to update the user. A green system message will appear at the top once the user group change has been made. To close the system message, click on the **Close** button on the far right corner of the system message.

4. To access position descriptions, hover over the Position Descriptions tab at the top of the page, and select Staff from the drop down list to view the position descriptions that you supervise or have access to view in addition to your own position description.

5. Search for a position description that you want to request an other salary increase using the search box or browse through the table. To select the position description, click on the hyperlink PIN. To go back and select another position description, hit the **Back** button to go to the previous page with the list of position descriptions.

6. When the position description appears, you will see a list of position actions that may be taken on the position description. Click on Other Salary Increase hyperlink and then click on the **Start** button to begin the request.

7. On the Action Justification tab, respond to the questions and complete all required fields. You will notice that there is an Action Type drop down field. Select "Other Salary Increase" from the drop down list. This field is necessary to generate emails. When finished, click on the orange **Next** button to go to the next tab.

8. The Current Position Description tab is a read only copy of the position description. You may review the current position description and click on the orange **Next** button to go to the next tab.

9. The Job Duties tab is a read only copy of the general summary and job duties. You may review that information and click on the orange **Next** button to go to the next tab.

10. On the Supervisor tab, no changes are allowed. This tab is for Classification and Compensation use only. Click on the orange **Next** button to go to the next tab.

11. On the Employee tab, no changes are allowed. This tab is for Classification and Compensation use only. Click on the orange Next button to go to the next tab.

12. On the Position Documents tab, attach a position document using the instructional text provided in that tab. When finished, click on the orange **Next** button to go to the next tab.

13. On the Position Request Summary tab, review the information added to the position request. Click on the big Edit hyperlink near the position title at the top of the page to edit the position request or go directly to the summary section that you want to edit by clicking on the Edit hyperlink in that section. When finished, transition the workflow action to another user group or submit to HR using the following steps below [NOTE: You may add this position request to your watch list by checking the checkbox before clicking on the submit button.]:

    a. **Send to Another User Group** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select the next approver to send or return to another user for review. When the Take Action box appears, click on the **Submit** button to send or return the other salary increase to another user group. The user group(s) reviewing the position request may use the same steps above to review each tab, and send or return to next approver. This will be done until is it ready to be submitted to HR. Refer to the next step on how to submit the position request to HR.

    b. **Approve and Submit to HR** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select Approve and Submit to HR (move to Submitted to HR). When the Take Action box appears, click on the **Submit** button to submit the other salary increase to HR.

    NOTE: When an action is in any workflow state other than draft, the group-member prompt (drop down list in the Take Action box) allows a user to transfer the PD action to another specific user within the same workflow state. For example, if there is more than HR Liaison who needs to review an action before it is submitted to the Department Head, the first liaison can transfer the action to the other liaison within the HR Liaison workflow state. This is done by clicking Keep Working on this Position Request link and checking the "Transfer this Position Request to" check box and then selecting the user's name from the drop down list. The other liaison will be able to review the position and move it forward to the next approver or transfer it back. Please note, the system will not generate an email notice to the specific user since the workflow state is not changing. The liaisons transferring the action back and forth to one another within the same workflow state will need to communicate with each other when the action has been transferred for review. The current selected user is the one who can approve and send the position request to the next approver.

How to Request an Out of Cycle Merit Increase:

1. Login into the PATH System using Single Sign On (SSO) at https://sso.tamu.edu. After you have logged into SSO, select PATH from the Single Sign On menu to access the PATH system. If you need help with your UIN or password, click on "I forgot my password" on the home page of SSO, or contact Human Resources at 845-4141 or your department HR Liaison to have your SSO password reset.

2. After you have logged in, you will be taken to the Applicant Tracking home page. Hover over the down arrow next to Applicant Tracking module, and select Position Management from the drop down list to change the module. The header bar will turn orange when this is completed.

3. By default, you will appear in the Employee-PD Action user group once logged in. Click on the down arrow next to the Employee-PD Action user group and select a user group from the drop down list. Click on the **Refresh** button next to the user group to update the user. A green system message will appear at the top once the user group change has been made. To close the system message, click on the **Close** button on the far right corner of the system message.

4. To access position descriptions, hover over the Position Descriptions tab at the top of the page, and select Staff from the drop down list to view the position descriptions that you supervise or have access to view in addition to your own position description.

5. Search for a position description that you want to request an out of cycle merit increase using the search box or browse through the table. To select the position description, click on the hyperlink <u>PIN</u>. To go back and select another position description, hit the **Back** button to go to the previous page with the list of position descriptions.

6. When the position description appears, you will see a list of position actions that may be taken on the position description. Click on <u>Out of Cycle Merit Increase</u> hyperlink and then click on the **Start** button to begin the request.

7. On the Action Justification tab, respond to the questions and complete all required fields. You will notice that there is an Action Type drop down field. Select "Out of Cycle Merit Increase" from the drop down list. This field is necessary to generate emails. When finished, click on the orange **Next** button to go to the next tab.

8. The Current Position Description tab is a read only copy of the position description. You may review the current position description and click on the orange **Next** button to go to the next tab.

9. The Job Duties tab is a read only copy of the general summary and job duties. You may review that information and click on the orange **Next** button to go to the next tab.

10. On the Supervisor tab, no changes are allowed. This tab is for Classification and Compensation use only. Click on the orange **Next** button to go to the next tab.

11. On the Employee tab, no changes are allowed. This tab is for Classification and Compensation use only. Click on the orange Next button to go to the next tab.

12. On the Position Documents tab, attach a position document using the instructional text provided in that tab. When finished, click on the orange **Next** button to go to the next tab.

13. On the Position Request Summary tab, review the information added to the position request. Click on the big <u>Edit</u> hyperlink near the position title at the top of the page to edit the position request or go directly to the summary section that you want to edit by clicking on the <u>Edit</u> hyperlink in that section. When finished, transition the workflow action to another user group or submit to HR using the following steps below [NOTE: You may add this position request to your watch list by checking the checkbox before clicking on the submit button.]:

    a. **Send to Another User Group** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position

Request and select the next approver to send or return to another user for review. When the Take Action box appears, click on the **Submit** button to send or return the out of cycle merit increase to another user group. The user group(s) reviewing the position request may use the same steps above to review each tab, and send or return to next approver. This will be done until is it ready to be submitted to HR. Refer to the next step on how to submit the position request to HR.

b. **Approve and Submit to HR** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select Approve and Submit to HR (move to Submitted to HR). When the Take Action box appears, click on the **Submit** button to submit the out of cycle merit increase to HR.

NOTE: When an action is in any workflow state other than draft, the group-member prompt (drop down list in the Take Action box) allows a user to transfer the PD action to another specific user within the same workflow state. For example, if there is more than HR Liaison who needs to review an action before it is submitted to the Department Head, the first liaison can transfer the action to the other liaison within the HR Liaison workflow state. This is done by clicking Keep Working on this Position Request link and checking the "Transfer this Position Request to" check box and then selecting the user's name from the drop down list. The other liaison will be able to review the position and move it forward to the next approver or transfer it back. Please note, the system will not generate an email notice to the specific user since the workflow state is not changing. The liaisons transferring the action back and forth to one another within the same workflow state will need to communicate with each other when the action has been transferred for review. The current selected user is the one who can approve and send the position request to the next approver.

How to Request a Temporary Salary Increase:

1. Login into the PATH System using Single Sign On (SSO) at https://sso.tamu.edu. After you have logged into SSO, select PATH from the Single Sign On menu to access the PATH system. If you need help with your UIN or password, click on "I forgot my password" on the home page of SSO, or contact Human Resources at 845-4141 or your department HR Liaison to have your SSO password reset.

2. After you have logged in, you will be taken to the Applicant Tracking home page. Hover over the down arrow next to Applicant Tracking module, and select Position Management from the drop down list to change the module. The header bar will turn orange when this is completed.

3. By default, you will appear in the Employee-PD Action user group once logged in. Click on the down arrow next to the Employee-PD Action user group and select a user group from the drop down list. Click on the **Refresh** button next to the user group to update the user. A green system message will appear at the top once the user group change has been made. To close the system message, click on the **Close** button on the far right corner of the system message.

4. To access position descriptions, hover over the Position Descriptions tab at the top of the page, and select Staff from the drop down list to view the position descriptions that you supervise or have access to view in addition to your own position description.

5. Search for a position description that you want to request a temporary salary increase using the search box or browse through the table. To select the position description, click on the hyperlink PIN. To go back and select another position description, hit the **Back** button to go to the previous page with the list of position descriptions.

6. When the position description appears, you will see a list of position actions that may be taken on the position description. Click on Temporary Salary Increase hyperlink and then click on the **Start** button to begin the request.

7. On the Action Justification tab, respond to the questions and complete all required fields. You will notice that there is an Action Type drop down field. Select "Temporary Salary Increase" from the drop down list. This field is necessary to generate emails. When finished, click on the orange **Next** button to go to the next tab.

8. The Current Position Description tab is a read only copy of the position description. You may review the current position description and click on the orange **Next** button to go to the next tab.

9. The Job Duties tab is a read only copy of the general summary and job duties. You may review that information and click on the orange **Next** button to go to the next tab.

10. On the Supervisor tab, no changes are allowed. This tab is for Classification and Compensation use only. Click on the orange **Next** button to go to the next tab.

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12. On the Position Documents tab, attach a position document using the instructional text provided in that tab. When finished, click on the orange **Next** button to go to the next tab.

13. On the Position Request Summary tab, review the information added to the position request. Click on the big Edit hyperlink near the position title at the top of the page to edit the position request or go directly to the summary section that you want to edit by clicking on the Edit hyperlink in that section. When finished, transition the workflow action to another user group or submit to HR using the following steps below [NOTE: You may add this position request to your watch list by checking the checkbox before clicking on the submit button.]:

    a. **Send to Another User Group** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select the next approver to send or return to another user for review. When the Take Action box appears, click on the **Submit** button to send or return the temporary salary increase to another user group. The user group(s) reviewing the position request may use the same steps above to review each tab, and send or return to next approver. This will be done until is it ready to be submitted to HR. Refer to the next step on how to submit the position request to HR.

    b. **Approve and Submit to HR** – Refer to the workflow on the first page for this action. Transition the workflow by hovering over the down arrow next to Take Action on Position Request and select Approve and Submit to HR (move to Submitted to HR). When the Take Action box appears, click on the **Submit** button to submit the temporary salary increase to HR.

NOTE: When an action is in any workflow state other than draft, the group-member prompt (drop down list in the Take Action box) allows a user to transfer the PD action to another specific user within the same workflow state. For example, if there is more than HR Liaison who needs to review an action before it is submitted to the Department Head, the first liaison can transfer the action to the other liaison within the HR Liaison workflow state. This is done by clicking Keep Working on this Position Request link and checking the “Transfer this Position Request to” check box and then selecting the user’s name from the drop down list. The other liaison will be able to review the position and move it forward to the next approver or transfer it back. Please note, the system will not generate an email notice to the specific user since the workflow state is not changing. The liaisons transferring the action back and forth to one another within the same workflow state will need to communicate with each other when the action has been transferred for review. The current selected user is the one who can approve and send the position request to the next approver.