

## Executive/Managerial (EM) Classification Checklist

Before you consider creating an EM position or an EM class, please consult with the System Office of Human Resources (OHR) to ensure a smooth process and to avoid a “delayed process” moving forward.

1. When creating/re-describing an EM Position, ask yourself the following:

Is there an [EM class](#) that this position could fall under?

If YES, send draft PD to OHR for review to avoid back and forth (“delayed process”), when submitting through PeopleSoft (PS).

If NO, need to establish an EM class. Send draft class specs/proposed position description (PD)/request memo to OHR for review. Class specs should be general. OHR will review to ensure the class specs and the PD align.

2. Once OHR has given the “OK” for the class specs and/or PD, you may continue with the following:

If an EM class needs to be created, and the class specs, memo, and proposed PD was given the “OK” from OHR, route request memo for signatures and return to OHR for final recommendation to President’s Office.

If establishment of EM class is not needed, please skip to Step 3 part 2.

3. Once request to establish EM class memo is approved by President, you may continue with the following:

OHR will provide your department with the new EM class job code for PS position management transaction.

Input establishment/re-description of position into PeopleSoft and route for workflow approval. For new positions, effective date will be the date that President approves or a future action date. For re-descriptions, effective date should reflect a future date (estimating the 1<sup>st</sup>/16<sup>th</sup> after which the final approver – OHR- takes action).

Please ensure that appropriate position characteristics are inputted/updated. Additionally, attachments should include the PD/Org Chart/Approved Exception to Fill/Hire (if applicable).

4. Once the EM position management request is approved, for new/vacant positions, you may begin your recruitment.

### TIPS/REMINDERS:

- Creating/changing classes should occur on a **limited basis**. If creating a class, it should relate to the unit’s organizational structure (i.e. Manoa Phase 2 Reorg).
- EM Classes should be “evergreen” generally outlining the scope of responsibility and organizational impact of the position.
- Position descriptions may be more “timely” and include language about specific offices or systems, and explain in detail the duties and responsibilities of the position, as well as the minimum and desirable qualifications required to perform the position.