Procedures for Creating Merit Requisitions
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Information you should have on hand before initiating a Merit Requisition:

- Position number (from Dept. budget information).
- Master File Key/MFK (from Dept. budget information).
- Classification description from Board of Regents (http://hris.uiowa.edu/classcomp/merit/)
- Department Position Description/PDQ (http://hr.uiowa.edu/dept-comp-class/forms-templates)
- Essential and Marginal Functional Analysis Form (Located in the Merit Requisition form)
- Special Qualifications Definitions (http://hr.uiowa.edu/careers/merit/special-qualifications)
- Work Sample/Questions for each requested Special Qualifications.
- Salary-beginning rate for the classification. http://www.uiowa.edu/hr/classcomp/merit/
- Additional helpful information is available on the Employment Services web page (http://hr.uiowa.edu/tools-departments/merit-employment)

IMPORTANT NOTE: Once a position has started advertising and a department decides to change significant information the original requisition will need to be canceled. A new requisition with the accurate information will need to be submitted to Employment Services.

If information is changed regarding the duties, the information will need to be reviewed to determine if the change would potentially change the pool of applicants. Request the requisition be cancelled by sending an e-mail to the following Merit Employment staff (mailto:beverly-mason@uiowa.edu, mailto:leslie-ungs@uiowa.edu, mailto:marlo-laing@uiowa.edu) explaining the reasons for changes. Please cc: mailto:lyra-dickerson@uiowa.edu

Significant changes include but are not limited to the following items:

- Work location
- Percentage of appointment
- Hours of work
- Days off
- Special qualifications (adding or deleting)
- Changing from an annual to school year position.
Initiating a Merit Requisition

To access the Merit Requisition form, go to Self Service/Administration tab and under Systems select Jobs@UIowa.

Under the Create a Requisition section, select Merit.
There are two fields (denoted by red asterisks) that are required to start a requisition: **Form Type** and **Ad Start Date**. Make sure the required information you provide is correct as Employment Services cannot edit.

There are four different Form Types of Merit positions:

- **Regular** – Used to advertise a “regular” vacant fiscal year Merit position, which has an established position number.

- **School Term** – Used to advertise a “regular” vacant school term Merit position, which has established position number. These positions are usually for 9, 10, or 11 months.

- **Regular Departmental Competitive Promotion** – Used for Supervisory Exempt and Confidential positions that are not to be advertised due to promotion from within the department. This has an established position number.

- **Temporary** – Used to advertise any Merit “temporary” position. A position number is not required.

*Regular Position Requisition* is the default. If you are initiating a position *other* than Regular, select the type of position from the list in the drop-down box next to Form Type. Merit Regular, School Term, and Regular Departmental Competitive Promotion positions have established 8 digit position numbers.
General Merit Requisition Data

Regular, School Term Positions, and Regular Departmental Competitive Promotion

NOTE: A Section Help link is located under the header of each section of the Merit Requisition form.

If you entered a position number on the previous screen, the following information about the position is automatically filled in at the top of the form: Title, Confidential, Job Code, Supervisory Exempt, Position Number, Department ID, Department Name, Sub-Department, Grade.

Lead status refers to an expansion of duties within a position. Positions will not be advertised as “Lead”. Initiators need to contact Trevor Glanz (335-1848) in Compensation & Classification prior to submitting Lead position requisitions, in order to have the Lead status removed.

For answers to some of the most frequently asked questions regarding filling a Merit position, refer to the Frequently Asked Questions page (http://hr.uiowa.edu/tools-departments/merit-employment) on Employment Services website.

There are two types of required fields. They are designated with one or two red asterisks.

When the initiator has completed the required fields to “Save a Draft” and then selects Save as Draft, the requisition number will then be assigned. This allows the department to add the requisition number and established position number to the Essential and Marginal Job Functional Analysis form before attaching it to the requisition form.

After all the information has been entered in the requisition, select Finalize to process the form through Workflow. You can attach any forms to the requisition at this point.
Temporary Merit Position Data

All applicants must have an active electronic Merit Application Form before they can be hired.

Merit Requisitions are only required for Temporary Merit positions that are to be advertised.

Employment Services (contact Leslie 335-2658) has a list of names of individuals who have indicated in their application they are available for short-term work, primarily clerical or service support.

A requisition is not required for Temporary Merit positions if the department knows who they intend to hire. To appoint the individual follow the instructions found on the Employment Services web site, http://hr.uiowa.edu/tools-departments/appointing-hourly-merit-employees

The following are not mandatory, but may be required by the Hiring department:

- Meet Classification minimum requirements
- Meet Special Qualifications (Example: If the department has typing as a special qualification, the person to be hired needs to have a current typing score on file with Employment Services.

Temporary position requisition forms:

- Essential and Marginal Job Functional Analysis form is not required
- There are no position numbers for Temporary positions
- Use the hourly salary from the Merit Alpha Matrix (dollars & cents format, ie: 10.18)
- The top of the form will display **Org-Dept** and **Job Code** only
- The Org-Dept must meet the format ## - #### in order to Finalize the form
- The Job Code must be a valid Merit Job Code (AA##)
Advertising Dates

The **Ad Start Date** can be the date the form is initiated, or a date in the future. In order to move the requisition into Workflow, the **Ad End Date** must be entered as 5 business days after the Ad Start Date. Use the date the form is initiated as the Ad Start Date. Employment Services will edit the Ad End Date to reflect the required advertising period on the Jobs@UIOWA website: [http://jobs.uiowa.edu](http://jobs.uiowa.edu)

Advertising periods for Merit positions:

- **Contract Covered**: 5 business days
- **Confidential**: Can advertise for more than 5 business days; 10 business days is recommended
- **Supervisor Exempt**: Can advertise for more than 5 business days; 10 business days is recommended
- **Temporary**: Immediately placed on extended advertising
- **Trainee**: Minimum of 10 business days

The **Advertising Options** field has two options:

- **Until End Date Above** should be used for all Merit requisitions that will advertise on the job line
- **Do not Advertise** this Requisitions should be used for Departmental Competitive Promotion for non contract-covered positions in all departments.
General Job Information

This section contains salary and work location information. The *Monthly* salary generates the *Annual* salary that appears on the Jobs@UIOWA website listing for each position.

**Monthly Salary:** The monthly salary is linked to the position number, and is automatically inserted in this field. If you have a full-time position that is being filled by 2 half time people, you have to change the monthly salary accordingly. You will need to compute the salary for less than 100 percent positions or use the Pay Grade Matrix link located next to the salary field.

*To compute the salary:* Determine the % of time by dividing the hours to be worked by 40. Multiply the % of time of the full time monthly salary listed on the Merit Alpha Index [e.g., $32 \div 40 = 80\%$; $2517.7 \times 0.8 = 2014.224$ (use 2014.22; do not round up or include comma in salary)]

**School Term** position annual salaries are prorated to reflect the 9, 10, or 11 month period they actually work. They are paid the full monthly salary, times the number of months actually worked.

**Advanced Starting Salaries** have been approved for certain classifications. They are highlighted in green in the Merit Alpha Index.

**Building:** Use the drop-down box for a list of all University Building locations. If the building is not listed, call Marlo Laing at 335-2947.

**Contract Work Location/Area:** This field describes the work location for contract transfer purposes for all contract-covered positions. It does not necessarily reflect the physical work location; it cannot be a room number. To view current contract work locations select the link next to this field. This is information is subject to change, so always consult the Transfer Locations information.

**Confidential and Supervisory Exempt positions** are not covered by the Collective Bargaining Agreement; therefore, leave the Contract Work Location/Area blank for these positions.
Sub-Department Descr: This field can be used to give additional work location details to applicants (e.g., HR Employment Services).

Background Check Required: Check this box if a criminal background check is required for the position. When checked, specific wording is inserted in the position description on the Jobs@UIowa website to alert applicants that a background check will be conducted:

Successful candidates will be subject to a criminal background check. Background checks (criminal history, child/dependent adult sexual abuse) will be conducted on final candidates.

Work Sample Required: A work sample/related question(s), with the exception of typing, is required for each requested Special Qualification. Enter a check in the box, even if related questions are all that will be asked. Work samples may be given for skills not listed as Special Qualifications. They can be used to evaluate applicant’s skill levels, but cannot be used to disqualify applicants.

When this box is checked, specific wording is inserted in the position description on the Jobs@UIOWA website to alert the applicants that a work sample will be conducted:

A work sample evaluation will be given during the interview process.

Work Schedule

This section describes the hours and the days the employee will work.

![WORK SCHEDULE]

Hours Per Week: Enter the standard number of hours to be worked the majority of the days per week. If they will work other days/shifts during the week, enter that information in the Extra Description field (note: do not enter a period at the end of the description).

Shift: There are two types of shifts from which to choose. They can either be:

- **Straight** (select one of the following: 1st, 2nd, or 3rd)
- **Rotating/Not Straight**: (combination of 2 or more shifts)
Shift Definitions:

- 1st shift: the hours do not fall under the 2nd or 3rd shift definition
- 2nd shift: 4 or more hours occurring between 6 pm and midnight
- 3rd shift: 4 or more hours occurring between midnight and 6 am

Shift Begin and End times: These fields are required for Straight shifts; list times for majority of days the hours are to be worked. These fields are not required for Rotating/Not Straight shifts; enter a description of days/hours in the Extra Description window. If there are different work hours on a particular day during the primary shift, enter the Begin and End times for the majority of the days those hours will be worked during the week and then describe the difference in the Extra Description field (e.g., will work 6:30 am to 3:00 pm one day during the week).

If the routine work days are Monday-Friday, select the Regular designation and check Saturday and Sunday as days off. If the work week in the primary work schedule are other than Monday-Friday, check the boxes next to the days not worked. List the actual days worked in the Description of Days/Hours field (if the position only works Saturday and Sunday, indicate that in the Description field). If the days off will vary during the week, select Rotating and leave Check Days Off boxes blank; then enter the days to be worked in the Description field (e.g., work rotating days Monday through Saturday).

Job Details

The viewable space in the text field for many descriptions is limited to 250 characters. It is recommended that you create a Word document for any field that requires a description or explanation. The word document allows you to see the whole text. To determine the number of characters in the paragraph, type the information in the word processing program on your computer and perform a word count. Copy and paste the description into the appropriate area of the requisition form. Save the Word document in your computer for future use. Be sure to proofread the information you inserted in the requisition.

Additional Hours Details

List any hours to be worked over and above the standard number of hours for the position, regardless of whether the position is full time or part time in this section. Do not use the word “overtime” for any positions working less than 40 hrs/wk.

The following are suggested examples of Additional Hours Details descriptions:

- As necessary
- As required/requested by department
- Occasional evening and weekend hours are required
- Occasionally work additional hours
- Often requires additional hours to complete tasks
- To attend staff meetings and cover staff absences
- To cover peak periods of operation and staff absences
Description of Duties

The job duties and responsibilities should be broken down into the primary tasks to be performed and should include:

- Support for the requested Special Qualification(s)
- More specific information than the General Class Description of the classification description for that position
- Listing each duty and responsibility into separate sentences, rather than one big paragraph

The Description of Duties field has **unlimited** character space.

Special Qualifications, Licenses & Certifications

Special Qualifications cannot be requested for Service area positions, except for the driver’s license.

The use of Special Qualifications to appropriately narrow the pool of applicants has been an issue that has been watched closely by AFSCME. Special Qualifications should be used sparingly for only those skills that cannot be attained in a brief/reasonable period of time. Employment Services has always supported the use of appropriate Special Qualifications and evaluation methods as tools used to help increase the success rate of qualified hires. Whenever Special Qualifications are posted with a position, the rationale for it and the tools used to evaluate each one, is subject for review by the union or any other entity that may represent an applicant. If the department has ever trained a student or temporary worker for a skill, it is not appropriate to request the skill as a Special Qualification.

Contact Jane Monserud (335-2652) or your HR Unit Representative if you have questions regarding appropriate Special Qualifications for positions.

Merit classification minimum requirements must be entered as either Special Qualifications or Licenses/Certifications in order for them to be screened by the Electronic application. To review minimum requirements, refer to the Merit Job Classifications [here](http://hris.uiowa.edu/classcomp/merit/).
The minimum requirements for the specific classifications listed below must be included in the appropriate section of the requisition form:

**Special Qualifications:**

<table>
<thead>
<tr>
<th>Classification</th>
<th>Special Qualification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secretary I, II, III, &amp; IV</td>
<td>40 wpm typing and Word Processing</td>
</tr>
<tr>
<td>Clerk Typist III</td>
<td>40 wpm typing and Word Processing</td>
</tr>
<tr>
<td>Clerk Typist I &amp; II</td>
<td>40 wpm typing</td>
</tr>
<tr>
<td>Hospital Communication Specialist</td>
<td>20 wpm typing</td>
</tr>
<tr>
<td>Pharmacy Technician Trainee</td>
<td>15 wpm typing</td>
</tr>
<tr>
<td>Pharmacy Technician, Certified</td>
<td>15 wpm typing</td>
</tr>
<tr>
<td>Senior Pharmacy Technician, Certified</td>
<td>15 wpm typing</td>
</tr>
</tbody>
</table>

For Secretary and Clerk Typist positions, it is possible to request a Special Qualification of 45 or 50 wpm typing from the drop-down list. Office Coordinator I and II positions also may have higher typing speeds when warranted by their responsibilities. For classifications where a typing speed is **not** part of the minimum requirements, you may only request a Special Qualification of 15, 20, or 30 wpm from the drop-down list.

For Clerk III positions where Power Point, PC Database, PC Spreadsheet, or Word Processing is requested as Special Qualifications, a 30 wpm typing Special Qualification is recommended. Anything less than 30 wpm would not allow for the timely completion of tasks using those Special Qualifications.

For requisitions with approved Special Qualifications, either a work sample or the questions related to the skill that will be asked during the interview process must be attached to the requisition before the end of the initial advertising period. No work sample is required for typing. Work sample/questions(s) can only be attached after the requisition has been Finalized.

The work sample/question(s) should be used to evaluate an applicant’s ability to perform specific skills at the level required by the department.

Work samples may be given for skills not listed as Special Qualifications. They can be used to evaluate applicant’s skill levels, but cannot be used to disqualify applicants.

Definitions of Standard Special Qualifications ([http://hr.uiowa.edu/careers/merit/special-qualifications](http://hr.uiowa.edu/careers/merit/special-qualifications)) can be used to develop the questions. The Definitions are used by Employment Services to determine the applicant’s minimum eligibility for approval of a Special Qualification. More in-depth skill-specific information is needed by the department to determine if the applicant’s level of knowledge and ability is adequate for the position.

The work sample can either be a duplication of the actual work to be done, such as filing, that does not require any knowledge of the department’s procedures, or it can be more general in scope, such as reading for comprehension.

The following information should be included for each requested/approved special qualification:

- The acceptable level of performance for the skill (passing criteria)
- Acceptable responses for all questions
- How the acceptable level was determined. Did the department have existing staff take the work sample, etc.?
- How long the applicant will have to complete the work sample
Licenses/Certifications:

<table>
<thead>
<tr>
<th>Dental Assistant II &amp; III</th>
<th>Iowa Dental Radiography Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Iowa Registered Dental Assistant</td>
</tr>
<tr>
<td>Pharmacy Technician, Certified</td>
<td>Certified Pharmacy Technician</td>
</tr>
<tr>
<td>Senior Pharmacy Technician, Certified</td>
<td>Certified Pharmacy Technician</td>
</tr>
</tbody>
</table>

“Classification minimum requirement” is all that is necessary for the Rationale section.

When the requisition form opens initially, only one window will appear in each section.

The Special Qualifications field has a drop-down box that will list desired special qualifications; highlight the one you want, tab out of drop-down list and complete the rationale for that qualification. If you have more than one qualification to enter select Add Special Qualification which will display another field for you to enter. Repeat until all have been entered.

The Licenses/Certification field has a drop-down box that will list necessary licenses/certifications; highlight the one you want, tab out of drop-down list and complete the rationale for that license/certification. If more than one license/certification is required, select Add License/Certification which will display another field for you to enter. Repeat until all have been entered.
If a Driver’s License or CDL is required for a position, select it from the drop down list of licenses in the Licenses/Certifications category. By listing the Driver’s License as a Special Qualification, information regarding the ability to meet the University of Iowa Fleet Safety Driving Program is automatically inserted in the position description on the printed Job Line and the Jobs@UIOWA website:

*Driver’s License, plus the ability to meet The University of Iowa Fleet Safety driving standard*

A Driver’s License is required for the following classifications:

- Automotive Mechanic
- Facilities Coordinator
- Facilities Services Coordinator
- Mail Distributor
- Mechanic’s Assistant
- Motor Vehicle Operator
- Motor Vehicle Operator II
- Parking Facilities Mechanic
- Parking Maintenance Worker I & II
- Parking/Transporation Attendant
- Parking/Transportation Field Service Officer
- Parking/Transportation Supervisor
- Patient Transportation Driver
- Patient Transportation Coordinator
- Supervisor, Plant Services
- Water Plant Operator

**Other:** For any other Special Qualifications or Licenses/Certifications not in the drop down lists, use the Other category. Enter the Special Qualification or License/Certification in the Other text field and then provide a Rationale for the qualification. If you have more than one to enter, select Add Other and repeat the steps above.

Special Qualifications in the Other category will be specific to this transaction and will not be prescreened by Employment Services. It is the submitting Department’s responsibility to screen for all Special Qualifications listed in the Other category.

Information in all three of these categories will be included in the advertisement on the Jobs@UIowa website.

The Rationale field must be completed for each Special Qualification, License/Certification, or Other listing and include the following information:

- What percent of time the duty is performed
- Why the skill is needed
- Has the department trained anyone in this skill?
- Is training available in the department?
- Length of time that would be needed to train a person without this skill
Rationale example:

**PC Spreadsheet** - Required 15%. Using MS Excel, this position will enter and track clinical, financial, and research information. They must be able to create, save, and write formulas in a spreadsheet. The department has never trained anyone in this skill and training is not available. It would take 6 months to train a person without this skill.

The rationale information will not advertise on the Jobs@UIowa website.

**Making Changes to Special Qualifications**

**Before** the requisition begins advertising:

- Email the Employment Services staff (marlo-laing@uiowa.edu, beverly-mason@uiowa.edu, or leslie-ungs@uiowa.edu) requesting the requisition be returned to the Initiator’s Workflow Inbox.
- The Initiator can make the changes.
  - To Delete a Special Qualification or License/Certification from the requisition, select Edit. Go to the drop-down list of the appropriate section and move the highlight bar to the blank space at the top of the list; tab out of the field to clear the field; select Save Changes at the bottom of the requisition form.
- Return the requisition for processing; requisitions returned by 11 am will begin advertising the next business day.

**During** the requisition initial advertising period:

- If a Special Qualification needs to be added or removed for any reason, at any time after it has begun advertising, **the requisition must be cancelled**.
  - If changes do need to be made, email lyra-dickerson@uiowa.edu and cc: beverly-mason@uiowa.edu, leslie-ungs@uiowa.edu, and marlo-laing@uiowa.edu indicating the original requisition needs to be cancelled and the reason for its cancelled.
- A new requisition must be initiated.

**After** the requisition has completed its initial advertising:

- Special Qualifications **cannot be changed** once the Requisition has completed its initial advertising period, or been placed on extended advertising.

**NOTE:** Once a priority candidate has been referred, it must be obvious the change was not made in order to eliminate that individual from consideration.
**Additional Advertising Info**

This field can be used for information that needs to advertise where no other field applies. This information will advertise on the Jobs@UIowa website. There is a 250 character limit in this section.

**Desired Qualifications**

If you do not want to list a skill, license or certification as a Special Qualification, but would like applicants to possess them, you can indicate your preference in this field. You can say “prefer” before the skill, as in “Prefer Word Possessing experience”. This will not preclude applicants from consideration if they do not have these skills. There is a 500 character limit in this section.
**Functional Analysis**

The Essential and Marginal Job Functional Analysis must be attached to *all* (except temporary) Merit requisitions after the requisition has been finalized. Attach the form as a Word document not as a PDF. This form should be reviewed before submission. Make sure you include Position and Requisition number in the spaces provided. The information on the Essential and Marginal Job Functional Analysis will not advertise on the printed job line or the Jobs@UIowa website.

**Interview Selection Criteria Requirements**

The Interview selection criteria that the hiring department will use to determine which candidates to interview must be attached to the requisition. The interview selection criteria can only be attached after the requisition has been Finalized. The Interview Selection Criteria information *will not* advertise on the printed Job Line or the Jobs@UIowa website.

The interview selection criteria should be used to determine which applicants to interview based on the special qualifications and the preferred qualifications desired by the department. The criteria can be used to evaluate an applicant’s qualifications, but cannot be used to disqualify applicants unless during the interview the applicant does not meet the pre-established minimum level of acceptable performance/response for one or more of the pre-approved advertised special qualifications. The interview selection criteria will be used to determine the basis for selecting or not selecting a veteran for an interview or a job offer.

The following information should be included for each individual position’s selection criteria:

- The approved special qualifications that were advertised with the position.
- The preferred qualifications desired of applicants selected for interview.

Templates (Veteran’s Merit “Pre-Interview” Information and Veteran’s Merit “Pre-Offer” Information) are located at [http://hr.uiowa.edu/tools-departments/merit-employment-forms](http://hr.uiowa.edu/tools-departments/merit-employment-forms).
Contact Information

This section contains the contact person for this specific requisition. To choose a contact, select the Choose/Edit link and do a search for the individual. The name will be pulled directly from the employee database. Enter the phone number of the contact, including the area code. Nothing in these fields will be included on the Job Line or on the Jobs@UIowa website.

General Information

MFK

This section is for departmental use only. It is up to the department whether or not they want to enter the MFK information.

Search Committee Admins

A Search Committee admin is a required field. It is recommended that more than one person be included as an Admin so in the absences of the primary Admin, the requisition can be processed after it has ended advertising. Search Committee Admins have the following abilities that committee members do not:

- Open the applicant pool
- Provide the Final Applicant Summary

Select the Choose/Edit link to bring up the instructions for entering the names of the Admins.
Search Committee Members

Search committee members are responsible for reviewing the materials submitted by the applicants once the Search Committee Admin has opened the pool to review applicants. Committee members will also be able to rate each of the applicants.

To choose Search Committee Members follow the same procedure above for selecting Admins.

Comments

This section is for additional information about anything that pertains to the requisition. This information will not advertise on the Job Line nor will it be available to applicants.

Example:

- Incumbent’s Name
- If requisition is to advertise at a future date.
**Finishing the Requisition**

The bottom of the form will have three options:

- **Reset**: This will clear all information previously entered that has not been saved.
- **Save as Draft**: This will save the form as a draft in the HR Transaction System. At this point the form will be assigned a Transaction number and a Requisition number which will be displayed in the confirmation screen when you select this option.
  - To retrieve the Draft of the requisition, select the **Search My Requisitions** link from the Jobs@Uiowa section of Self Service.
- **Finalize**: This tab completes the requisition form and sends it to the Workflow system to be processed. After finalizing the requisition, the routing options screen will open. If a workflow path needs to be established for the Merit Requisitions form type, contact your Workflow Administrator.

Select the radio button next to the appropriate Workflow Routing Path displayed and then select *Continue*. 
Attaching Documents

The Workflow Routing screen will then display which is where you select one of three routing options:

- Send to next approval level plus someone from my alternates list.
- Send to an alternate for intermediate approval.
- Void this form, removing it completely from workflow.

Information regarding attachments is provided on the right of the screen, including a list of suggested attachments. To attach required documents to this requisition select Attach Documents.

There are seven types of documents that can be selected from the drop-down box:

- Correspondence
- Functional Analysis
- Organizational Chart
- Position Description Questionnaire
- Pre-Interview Template
- Pre-Offer Template
- Work Sample
NOTE: All permanent merit requisitions must have a current Essential and Marginal Job Function Analysis form attached in order for the requisition to be processed. This must be a Word document, not a PDF. If the form is a PDF, Employment Services cannot make any changes and the entire merit requisitions form will be returned to the department.

After you select Attach Document you will be asked if you want to attach another document. Repeat the process for every document you want to attach. All attached documents will display under the Current Attachments heading.

Once you close the Attachment window, the Workflow Routing screen will return. Select Continue to go to the Confirm Workflow Routing screen and then Continue again to finish the form and send it to those on the approval path.
Assistance

Contact the following individuals for:

**Merit Requisitions**
- Marlo Laing (335-2947)
- Bev Mason (335-2659)
- Leslie Ungs (335-2658)

**Departmental Competitive Promotion process forms:**
- Leslie Ungs (335-2658)

Referral of applications for positions
- Bev Mason (335-2659)

Appointment form questions
- Leslie Ungs (335-2658)