iReview Deployment

Presented by: Human Resources and Computing & Communications

May 7, 2010 (Draft subject to minor revisions)
iReview Introduction

Presenters:

- Cynthia Seneriz, Compensation Manager, Human Resources
- Josh Bright, Project Manager, Computing & Communications
iReview Meeting Agenda

- Meeting room/screen layout
- Webinar format
- Background information on iReview
  - System development
  - Pilot phase
- iReview Roles
  - Coordinator/Initiator, Supervisor, Department Approver and Pre-Approver, Organizational Unit Approver and Pre-Approver, and HR Analyst
- Reporting
Meeting Room Screen Layout

- Notes are shown on the top left side
  - Serves as a reminder to those participating and joining the webinar late

- Chat (Q&A) are shown on the lower left side
  - Questions directed to the presenters can be typed in the Chat box during the presentation
Webinar Format

› Chat (Q&A)
  › Questions can be submitted at any time
  › Once submitted, questions will be visible to the presenters only
  › The presenters will pause at three different intervals during the presentation, and again at the end, to address the questions that have been submitted by the participants
  › Not all questions may be displayed if similar questions on the same topic are submitted
iReview Background

iReview, HR’s newest enterprise application

- iReview replaces the existing paper /email process of requesting reclassification and equity reviews with a web-based system for submitting reclassification and equity reviews for staff employees

- iReview will be used to prepare, submit, document, and track requests and the resulting recommendations
iReview Background

iReview was developed in collaboration with a cross campus workgroup composed of

Chuck Rowley, C&C
Josh Bright, C&C
Tina Caroline, CNAS
Cherie Cooksey, CNAS
Cathy Eckman, VCSA
Sue Hancock, CHASS
Susan Marshburn, VCSA
Heidie Rhodes, FBO
Lin Slocum, BCoE
Karim Zahedi, Chanc/EVCP
iReview Background

Pilot Phase (9/2009 to 4/2010)

- Three organizational units participated in the pilot phase of iReview
  1. Student Affairs
  2. College of Natural & Agricultural Sciences
  3. Computing & Communications

- Many enhancements were incorporated as a result of the feedback
iReview Background

Campus Deployment in May 2010

- Webinars are scheduled for May 13th, 19th, and 26th at 2:00 p.m.
- Beginning June 1st, all reclassification and equity reviews will be submitted through iReview
- On-going training needs will be evaluated
Roles in iReview
iReview Roles

Flexible Role Assignments

- A role may be assigned to more than one individual
- An individual may have more than one role
- Departmental SAAs can update roles in real time in EACS
- Roles at the organizational unit level are assigned by Human Resources in EACS
iReview Roles

- Departmental SAAs assign the roles of:
  - Coordinator/Initiator
  - Department Pre-Approver
  - Department Approver

- The Supervisor role is not assigned in EACS. It is the designated primary supervisor in the Enterprise Directory.
iReview Roles

- Candidate
- Coordinator/Initiator
- Supervisor
- Department Pre-approver (not required)
- Departmental Approver
- Organizational Unit Pre-approver (not required)
- Organizational Unit Approver
- HR Analyst
iReview Process Overview

- Coordinator/Initiator
- Supervisor
- Departmental Pre-Approver (optional)
- Departmental Approver
- Candidate (optional review/input – THIS FEATURE IS PENDING)
- Organizational Pre-Approver (optional)
- Organizational Approver
- HR Final Recommendation
- HR Analyst
- HR Reviewer (optional review)
iReview
Where Do I Start?
Accessing iReview

iReview is accessible via R’Space. Individuals assigned roles in iReview will see the link under Authorized Applications.

Actions that require your attention will be displayed under Alerts in R’Space.
Coordinator/Initiator role

1st Step: Create the Request

iReview Process Overview
Coordinator/Initiator role

Main Menu

The role of the Coordinator/Initiator is to initiate the request in the iReview system.

The ability to create a review is limited to the Coordinator/Initiator role.
Coordinator/Initiator role

Main Menu

Process WIP Review Requests:
Indicates those reviews that the iReview user is responsible for routing to the next reviewer.

View Open Review Requests:
Indicates those reviews that are open elsewhere within the accountability structure.

View Completed Requests:
Indicates those reviews that were issued a recommendation by HR and concurrence by the org unit.
Coordinator/Initiator role
Main Menu

Welcome, iReview User
Main Menu
Process WIP Review Requests (3)
View (Read Only) Open Review Requests (6)
View (Read Only) Completed Review Requests (1)
iReview Summary Reports
Exit Application

Welcome to iReview, UCR's online staff equity and reclassification review system. Please utilize the links to the left to create, process or view equity and reclassification requests for your department or organization. The links below provide additional resources beyond iReview, including the iReview Support Site, to assist you in the review process and use of the system.

- Title & Pay Plan
- Enterprise Directory
- Enterprise Directory Administrator List
- Human Resources
- iReview Support Site

Note:
Supervisors, Dept Approvers, and Org Unit Approvers utilize the same Main Menu options

- Process WIP Review Requests
- View Open Review Requests
- View Completed Requests
An iReview user may have more than one role, and may need to act in multiple roles.

Example: Coordinator/Initiator & Dept Pre-Approver

Example: Supervisor & Dept Approver

In these instances, the review will be routed sequentially to EACH role, despite the fact that the user may hold both roles.
The purpose of the certification is to acknowledge that classification reviews are based on changes in the job duties and not on other factors, such as longevity, performance or workload.
Coordinator/Initiator role

Employee Information screen

By simply entering in the employee’s UCR NetID, the Coordinator/Initiator creates the review request (reclassification or equity).

All of the relevant data elements (e.g., title, grade or step, years of service, etc.) are populated by iReview.

Years in Current Classification requires manual update in iReview.
Coordinator/Initiator role
Employee Information screen

The Employee Information tab displays the following note:

Salary information and salary review data will be provided once the Supervisor justification has been completed for the Classification Review Request.

The Coordinator/Initiator has limited access to iReview tabs. • Supervisor Information • Job Descriptions • Comments
The Supervisor role is not created in the iReview system, but is based on the supervisory assignment in the Enterprise Directory.

Incorrect supervisory assignments in the Enterprise Directory must be corrected before the iReview system will correctly route the request. The Coordinator/Initiator role should ensure that the information displayed is accurate.
Coordinator/Initiator role

Employee Information screen

After creating the review and confirming the accuracy of the Supervisor, the Coordinator/Initiator routes the request to the Supervisor.

The option to route the request to the candidate for input or review is not yet available.
Supervisor role

2nd Step: Complete Supervisor Questionnaire and Employee Information tabs.

Review Process Overview

Coordinator/Initiator → Supervisor → Departmental Pre-Approver (optional) → Departmental Approver

Candidate (optional review/input – THIS FEATURE IS PENDING) → Organizational Pre-Approver (optional) → Organizational Approver → HR Analyst

HR Final Recommendation

HR Reviewer (optional review)
Supervisor role

### Supervisor Questionnaire

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Details</td>
<td>The role of supervisor is based upon changes in the position as a result of:</td>
</tr>
<tr>
<td></td>
<td>Evaluation of responsibilities</td>
</tr>
<tr>
<td></td>
<td>Departmental/Organizational</td>
</tr>
<tr>
<td></td>
<td>Transfer or elimination of tasks</td>
</tr>
<tr>
<td></td>
<td>Change or elimination of skills</td>
</tr>
<tr>
<td></td>
<td>Increase in scope of assignments</td>
</tr>
<tr>
<td></td>
<td>Change in time requirements</td>
</tr>
<tr>
<td></td>
<td>General supervisory responsibilities</td>
</tr>
<tr>
<td></td>
<td>Knowledge and skills required to control the job</td>
</tr>
<tr>
<td></td>
<td>Former duties/responsibilities that have been reassigned or eliminated</td>
</tr>
<tr>
<td></td>
<td>Other</td>
</tr>
<tr>
<td>Notes</td>
<td>If you are unsure of positions, we cannot be sure. Please list the department name, the role, and the department</td>
</tr>
<tr>
<td></td>
<td>Additional comments</td>
</tr>
</tbody>
</table>
Supervisor role
Supervisor Questionnaire

The supervisor is the individual typically responsible for completing the Supervisor Questionnaire.

However, a supervisor could partially complete this page and continue to route it to the Dept. Pre-approver, if that is the practice in a department.

iReview will warn the supervisor that not all “required” fields have been completed, when the action to route the request is taken.
**Supervisor role**

**Supervisor Questionnaire** is composed of three sections:

1. **The basis (or reason) for the changes in job duties**

2. **The actual changes in job duties**

3. **Other related information concerning job duties**
The 1st section on the Supervisor Questionnaire tab provides the basis for the reclassification request. At least one of the four reasons must be selected as the basis for the request:

- Evolution of duties
- Reorganization
- Transfer or delegation of duties
- New duties, not previously performed within the department
At least one of the following areas must be explained in terms of actual changes in job duties:

- **Scope** – extent of impact
- **Complexity** – complexity of problems or assignments
- **Supervisory** – supervision exercised over other positions (supervision for career positions is most relevant)
- **Knowledge and skills** – level of expertise required to perform the job
In addition, the Supervisor Questionnaire requires a description of the significant changes in the job duties.

Changes must be described in terms of:
• “what was the job duty” and
• “how was the job duty performed”
  AND
• “what is the job duty now”
• “how is the job duty now performed”
Supervisor role
Supervisor Questionnaire

The 3rd section of the Supervisor Questionnaire asks for related relevant information concerning:

• Former duties that were reassigned or eliminated

• Other positions that appear to be similar
Supervisor role

Employee Information

- Follows the Supervisor Questionnaire
The iReview system requires that the **Supervisor Questionnaire** be completed before action can be taken in the Employee Information tab to identify the new title code and/or salary proposed for the reclassification.

Once the **Supervisor Questionnaire** is completed, iReview expands the Employee Information tab to allow the Supervisor to select the proposed title code and proposed salary for the reclassification.
Supervisor role
Employee Information

Employee data elements from PPS, Title & Pay Plan, and the Enterprise Directory are populated, eliminating the need to “look up” data elements.

The employee’s current salary, grade, fund sources, working title, and years of service are displayed.

The Supervisor will select the proposed title code, which will populate a number of informational fields including FLSA exemption status, change in bargaining unit, new salary grade, etc.
Supervisor role
Employee Information

The iReview system will automatically assume a 5% salary increase, or a one-step increase (rules based on individual collective bargaining agreements) for an upward reclassification.

If a salary increase other than 5% (or one-step) is proposed, the Supervisor selects “Yes” when prompted to indicate whether the salary increase is greater than 5% or one-step.
If a salary increase other than 5% (or one-step) is proposed, iReview expands the Employee Information tab to provide additional salary comparisons:

- Range penetration
- Resulting fiscal year increase
- Campus-wide average salary
- Organizational unit average salary
Supervisor role
Employee Information

For proposed salary increases that are
(1) greater than 15% for non-represented employees, or
(2) greater than the contract prescribed increase for represented employees

Additional justification is required.
Supervisor role
Employee Information

The Supervisor will be directed by the iReview system to return to the Supervisor Questionnaire.

iReview will present the supervisor with additional justification fields that must be completed to support the proposed salary increase that exceeds policy or collective bargaining agreements.
The Employee Information tab will also display the salary of the employee’s direct supervisor. This information is provided to evaluate the salary differential between the proposed salary for the employee and the existing salary of the employee’s direct supervisor.
Printing
Supervisor Questionnaire

Any iReview role with access to the Supervisor Questionnaire tab, may print a summary of the contents of the
• Supervisor Questionnaire and
• Employee Information

By selecting **Print View** link
Job descriptions supporting the reclassification are uploaded into the iReview system via the Job Description tab.

Job descriptions and organizational charts can be attached by all roles in iReview.
Before routing the request, the Supervisor can add comments to explain, highlight, or supplement the information provided.

Documents can also be attached once the comment has been saved.
Supervisor role
Routing Options

Once the supervisor completes the Supervisor Questionnaire and Employee Information tabs, the supervisor will route the request to the:

- Department Pre-Approver (if one is designated)
- Department Approver
- Return it to the Coordinator/Initiator
Open to All iReview Users

Overview

Welcome,
Review Request ID: 20090727000121
Review Request Type: Reclassification
Review Status: Returned to Sup. from from Dept. Approver

HR Contact Information
Certified By: Theresa McDonald
Employee Name: Theresa McDonald
User Role: COORDINATOR INITIATOR
Certified Date: 07/27/2009

Employee Information
UCR NetID:
Employee ID:
Personnel Program: 001
Home Department: D01135 - Enterprise App Development
Organizational Unit: O0321 - Computing & Communications
Email Address:
Phone Number:

Supervisor Information
Supervisor Employee Name:
UCR NetID:
Employee ID:
Payroll Title: PROGRAMMER/ANALYST III
Working Title: Project Manager
Email Address:
Phone Number:

Job Descriptions
Old Job Description: File submitted
New Job Description: File submitted
Comment: text at file comments
The Overview tab is available to all iReview users. It provides basic information concerning the request.
The Overview screen also displays a graphical and chronological history of the review. This portion of the page is available to all roles with access to iReview, including the candidate.
Departmental Roles

3rd Step: Departmental review of the request by Dept Pre-Approver and/or Dept Approver
Departmental Pre-Approver and Approver roles

- Dept Pre-Approvers and Approvers may
  - access all tabs
  - edit content
  - insert comments
  - Add/edit attachments
  - Route back to the Supervisor or the Coordinator/Initiator
The Dept Pre-Approver can route forward to the Dept Approver.

The Dept Approver can route forward to the Organizational unit.

The request will automatically route to the Org Unit Pre-Approver, unless that role is not designated. In those instances, the Org Unit Approver will receive the iReview request.
Organizational Roles

4th Step: Organizational review of the request by Org Pre-Approver and/or Org Approver
Organizational Unit Pre-Approver and Approver roles

- Org Unit Pre-Approvers and Approvers may access all tabs
- edit content
- insert comments
- Add/edit attachments
- Route back to the Dept Approver or Supervisor
Organizational Unit Pre-Approver and Approver roles

When circumstances require routing the request back to the Supervisor, there are two options:

- Return to Supervisor
  - By passes Dept Approvers
- Return to Supervisor (return required)
  - Requires re-routing through Dept Approvers
HR Analyst Role

5th Step: Human Resources receives the request and conducts its review of the position and/or salary

iReview Process Overview
HR Analyst role
Analysis/Recommendation

The analysis and recommendation made by the HR Analyst will be captured on this tab.

The current employee information is displayed, as well as the changes proposed by the reclassification request. The HR Analyst will prepare the recommendation, and indicate the recommended title and/or salary.
HR Analyst role
Routing Options screen

Once the analysis and recommendation is completed by the HR Analyst, it is routed to the Organizational Approver.
The Organizational Approver has the following options:

- Concur with HR and finalize
- Do not concur, return to HR
Organizational Unit Pre-Approver and Approver roles

- The Organizational Approver role routes the request to Human Resources (HR)

- After HR completes its review, the recommendation is routed back to the Organizational Approver. The Approver role
  - (1) concurs with the recommendation issued by Human Resources, or
  - (2) does not concur and routes the review back to Human Resources with comments, attachments, etc.

The review is not considered complete until the Org Approver concurs with the recommendation issued by HR
Each step of the routing process generates an email message from the sender role to the receiver role.

Alerts are generated in R’Space for the receiver.

The candidate receives an email for each routing action up to submission of the request to HR. The candidate also has access to R’Space to check on the status of the review.
iReview Communications

When the review is considered complete:

- Communication between the organizational unit level approvers and the departmental approvers need to continue outside of iReview
- Organizational approver(s) must notify department approver(s)
- Department approver(s) must notify the supervisor
- Supervisor must notify the candidate/employee
iReview Summary Reports are still in development, but there are several sample report options available in the meantime.
Still to be released

- Initial routing to the candidate/employee for review
  - Access will be limited to the Overview and Job Description tabs. The employee will be able to attach the old and new job descriptions and add comments at the start of the review.
Questions?

Human Resources

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- Channé Edwards, x-23010
- Sheila Morris, x-24565
- Sylvia Vasquez, x-24720