

Position Management: Creating/Evaluating a Non-Academic Position (AEPM)

The **AEPM form** can be used by the Human Resource Representative or Financial Officer to **add/evaluate a non-academic standing or fixed-term position.**

```
12/10/98          INTEGRATED BUSINESS INFORMATION SYSTEM          M1M1
10:24:28.4                                             DAM3

Any of the functions included in this system can be invoked by
entering the corresponding function code on the command line next
to 'NEXT FUNCTION:'. The following functions are available:

FUNCTION          DESCRIPTION          FUNCTION          DESCRIPTION
-----          -
FORM             Help Selecting HRS Forms      M2PI             Property Inventory
M2AH             IBIS Adhoc Functions          M2PR             Purchasing System
M2AS             EASY Elec. Appr. System       M2VA             Vendor System
M2BG             Budgeting System              BAMB             Budget Planning: BudAuto
M2FN             Financial System              M2IM             Inventory Management
M2FS             Facilities System              CODE             Codeset Maint. System
M2HR             Human Resources System        M2NC             Nat Conn. Applications
M2PA             Payroll System                M2PE             Pay & Effort Functions

NEXT FUNCTION: aepm 1          PREV MENU: NONE
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      HELP  MENU  CMPS  END      .      .      .      .      .      KEYS  PRNT  .
```

1. At **Next Function** on **M1M1**, type **AEPM**.

Press **Enter**.

> Note:

If you do not know the function to fast path, type in **M3PM** for a list of the Position Management functions.

COMPLETE REQUIRED FIELDS AND PRESS ENTER KEY			
12/10/98	POSITION MANAGEMENT FORM	Screen 1.0	
10:31:04.7	ADD/EVALUATE POSITION	AEPM	
		DAM3	
Form Action: 1	Document #:	Unit:	Confidential: Y
Effective Date: ___ / ___ / 2			Document Status:
H Admin Area: ___	Pos #: ___ - 000	3	Pos Type: P
4 Home Budget: ___ - ___ -	UP 5 App Salary: _____		Pos Status: UN
6 Class: _____	7 Pos Apt Type: _____		Rank: _____
8 Ex/Nonex: ___	Job Desc #: _____		Pos FTE: _____
Grade: _____	Req Job Desc #: _____ - ____0		Clssf Rvwrd: N
Sal Plan: _____	Job Desc Ttl: _____		
Per Rep #: _____			
Work Loc: ___ - 000			
Work Unit: _____			
Collapse Pos: N	Adm Pos Hld: N		Mult-apt Pos: N
Gen Pos Hld: N	Clssf Pos Hld: N		Sal Red Crcl: N
	Pos Stat Dte: ___ / ___ /		Submit Clssf: N
	Approved Classification		
Job Desc #: ___ - ___	OHR Log #: _____	Class: _____	Grade: _____
Job Title: _____		Rank: _____	EEO: _____

Enter the following information:

1. At **Form Action**, type in the form action.

> Note:

If you are not the home budget area for this position but have received the form because you are providing some of the funding, enter **CHG** at Form Action and go to the Salary Budget Distribution screen to enter your funding.

2. At **Eff Date**, type in the position begin date. The position begin date must be the same or earlier than the appointment begin date of the employee filling the position.
3. At **Pos Type**, type in a **P** for a **permanently funded** position *or* a **T** for a **temporary funded** position.

> Note:

Standing positions must be permanently funded.

4. At **Home Budget**, type in the budget number that is the administrative home of the position.
5. At **App Salary** (if funding is to be committed at this time), type in the annual salary.
6. At **Class**, type in the personnel class.

> Note:

Press **PF1** to view the appropriate class codes.

7. At **Pos Apt Type**, type in the budget position appointment type.

> Note:

Press **PF1** to view the appropriate appointment type codes.

8. At **Ex/Nonex**, if Class = STFF, type in an **E** for Exempt or an **N** for non-exempt.

Press the **Enter** key to establish the edits for the position being created.

```
COMPLETE REQUIRED FIELDS AND PRESS ENTER KEY
12/10/98                POSITION MANAGEMENT FORM                Screen 1.0
10:44:42.2              ADD/EVALUATE POSITION                  AEPM
                                                                DAM3
Form Action: ADD        Document #:                Unit:                Confidential: Y
Effective Date: 01 / 01 / 1999                    Document Status:

H Admin Area: 004                Pos #: _____ - 000        Pos Type: P
Home Budget: 02 - 004 - 08 UP    Bud Salary: 24000.00__        Pos Status: UN

Bud Class: STFF                Pos Apt Type: STN                1 Rank: ____
Ex/Nonex: E                    Job Desc #: _____        Pos FTE: ____
2 Bud Grade: ____                3 Req Job Desc #: _____    Clsf Rvwd: U
4 Sal Plan: ____                5 Bud Job Title: _____

6 Per Rep #: 020
7 Work Loc: UP - 000
8 Work Unit: 020
Collapse Pos: N                Adm Pos Hid: N                Mult-apt Pos: N
Cen Pos Hid: N                Clsf Pos Hid: N                Sal Red Crcl: N
                                                                9 Submit Clsf: Y

Pos Stat Dte: ____ / ____ / ____
Approved Classification
Job Desc #: ____ - ____        OHR Log #: ____                Class:                Grade:
Job Title:                    Rank:                EEO:
```

Required fields may vary depending upon the appointment type:

1. At **Rank**, type in the rank for Agricultural Extension Agents and Administrators, if applicable.

> Note:

Press **PF1** for a list of valid rank codes.

2. At **Bud Grade**, type in the grade requested.

> Notes:

- For Administrators, type **NA**.
 - Press **PF1** to list the valid grades.
3. At **Req Job Desc#**, type in the job description number being requested or leave blank if one has not been established.
 4. At **Sal Plan**, type in the appropriate monthly plan for Administrators and Staff. For Technical Service, type in the weekly plan (ex. 52W).
 5. At **Bud Job Titl**, type in the requested personnel job title.
 6. At **Per Rep #**, verify that the Human Resource Representative number is correct. If it is incorrect, type in the correct Human Resource Representative number.

> Note:

Press **PF1** for a list of Human Resource Representative numbers.

7. At **Work Loc**, verify the physical work location. In it is incorrect, type in the correct location code.

> Note:

Press **PF1** to list the valid location codes.

8. At **Work Unit**, verify the work unit. If it is incorrect, type in the correct work unit.

> Note:

Press **PF1** to list the valid work unit codes.

9. At **Submit Clsf**, if you want the classification to begin, type in a **Y**. This will send the form to Salary Classification for classification. If you do not want the position classified at this time, type in an **N**.

Press **PF8**.

If funding is going to be committed, the Salary Budget Distribution and Source/Destination of Funds screens can be completed anywhere in the approval cycle. However, they must be completed before final Financial Officer approval.

You can bypass this screen by pressing **PF8** and the Financial Officer will complete this screen.

This screen is the increase side of your budget amendment.

To complete the Salary Budget Distribution screen, do the following:

- If a position has split budget distributions, a line must be completed for each budget and fund.

```

12/10/98                POSITION MANAGEMENT                Screen 2.0
10:49:58.9             SALARY BUDGET DISTRIBUTION        AEPM
                                                                DAM3
H Admin Area: 004                Pos #: -000            Pos Type: P
Home Budget: 02-004-08 UP      New Pos Salary: 24000.00    Pos Status: UN

Temp Pos BA: N                Old Pos Salary:                Obj Code: 105

   Budget   Fund   AR#   Trn Cd   Sal %   Sal Amnt   Net Change
1.  0200408 UP  10010  004    10    12000
2.  0500408 UP  10010  004    10    12000
3.  _____  _____  6    _____  7
4.  _____  _____  _____  _____  _____
5.  _____  _____  _____  _____  _____
6.  _____  _____  _____  _____  _____
7.  _____  _____  _____  _____  _____
8.  _____  _____  _____  _____  _____
9.  _____  _____  _____  _____  _____
10. _____  _____  _____  _____  _____

NEXT KEY:
NEXT FUNCTION:
                                                                <HELP, MENU, END>
  
```

- For each budget distribution that you have financial responsibility for, complete as follows:

1. At **Budget**, type in the budget number for this distribution. The first distribution line must be the home budget and general funds. If there is no general fund charge to this budget and fund, enter a zero in the salary amount column or leave it blank.

> Note:

ARL is an exception to the general funds requirement.

- At **Fund**, type in the fund number associated with the budget for this distribution.
- At **Trn Cd**, type in the transaction code indicating the source of funds.

> Note:

For miscellaneous funds, leave this blank for they do not require a budget amendment.

- At **Sal%**, **DO NOT** type in this column.
- At **Sal Amnt**, type in the amount to be budgeted to this budget and fund.

If this position is not split with another area, press **PF8** to go to the **Source/Destination of Funds** screen.

- **For budget distribution(s) not under your financial responsibility:**

6. At **AA#**, type in the administrative area number providing the funding.
7. At **Sal Amnt**, type in the amount of funding to be provided by the administrative area.

This form must then be forwarded to each Financial Officer funding the position before the final approval of the home budget Financial Officer.

- **Non-home budget area:**

```

12/10/98                               POSITION MANAGEMENT                               Screen 2.0
10:49:58.9                             SALARY BUDGET DISTRIBUTION                             APEM
                                                                                               DAM3
H Admin Area: 004                        Pos #: -000                               Pos Type: P
Home Budget: 02-004-08 UP                New Pos Salary: 24000.00                 Pos Status: UN

Temp Pos BA: N                           Old Pos Salary:                               Obj Code: 105

   Budget   Fund   AA#   Trn Cd   Sal %   Sal Amnt   |   Net Change
1.  0200408 UP  10010  004    10   _50.0    5_ 12000 |
2.  0500408 UP  10010  004    10   _50.0    5_ 12000 |
3.  _____ |
4.  _____ |
5.  _____ |
6.  _____ |
7.  _____ |
8.  _____ |
9.  _____ |
10. _____ |

NEXT KEY:
NEXT FUNCTION:                               (HELP, MENU, END)

```

If this position is split with another area and you are the receiver of the forwarded form, complete as follows:

Go to the line with your administrative area number listed:

1. At **Budget**, type in the budget number for this distribution.

> Note:

If you are going to split the amount that your area is responsible for between 2 or more budget/fund combinations, go to the next available blank line and fill in the information as appropriate.

- At **Fund**, type in the fund number associated with the budget for this distribution.
- At **Trn Cd**, type in the transaction code indicating the source of funding.

5. At **Sal Amnt**, type in the amount to be budgeted to this budget and fund.

Press **PF8**.

> Note:

A funding hold will be placed on this position if the Salary Budget Distribution and Source/Destination of Funds screens are not completed before the Financial Officer approves the form.

If the Salary Budget Distribution screen has been completed, the Source/Destination of Funds screen will appear. This screen must be completed when the Salary Budget screen is completed.

> Note:

This screen will not appear for miscellaneous funds.

This screen is the decrease side of the budget amendment.

```

12/10/98                POSITION MANAGEMENT                Screen 3.0
11:02:44.5            SOURCE/DESTINATION OF FUNDS        AEPM
                                                                DAM3
H Admin Area: 004                Pos #: -000                Pos Type: P
Home Budget: 02-004-08 UP      New Pos Salary: 24000.00    Pos Status: UN

GENERAL FUNDS: 24000                BA#:
AG FED. FUNDS:                    Fndg Eff Dte: 01 / 01 / 1999    BA#:
AUXILIARY ENT:                    BA#:
UNIV SERU:                        Auto/Bat BA(A/B): A                BA#:
P.L. 94-482:                      BA#:

SOURCE/DESTINATION                Obj Trn   Incr /   Position
      Budget  Fund  Cd   Cd   (-)Decr  AA#   #   Suf   Pos   BA
1.    0200408 UF  0010  1B  0    -12000  004   6   ___   ___   P
2.    0500408 UP  10010 11B  10   -12000  004   ___  ___   ___   P
3.    _____  _____  _____  _____  _____  _____  _____  _____  _____  _____
4.    _____  _____  _____  _____  _____  _____  _____  _____  _____  _____
5.    _____  _____  _____  _____  _____  _____  _____  _____  _____  _____
6.    _____  _____  _____  _____  _____  _____  _____  _____  _____  _____
7.    _____  _____  _____  _____  _____  _____  _____  _____  _____  _____

MORE BUDGETS : N
NEXT KEY:
NEXT FUNCTION:
                                                                (MENU, KEYS, END)

```

To complete the Source/Destination of Funds screen, do the following:

- Fill in this screen only for your area of financial responsibility.
- Enter one line for each budget, fund and object category funding source.
 1. At **Budget**, type in the budget number to be decreased.
 2. At **Fund**, type in the fund number to be decreased.
 3. At **Obj Cd**, type in the University object code to be decreased.
 4. At **Trn Cd**, type in the transaction code. This code must be the same transaction code entered on the previous screen - Salary Budget Distribution.
 5. At **Incr/(-)Dec**, type in the amount. This amount will be a decrease to this budget, fund and object code
 6. At **Position #**, if you are reducing an unfilled position to fund this position, type in the position number your are reducing.

Press **PF8** if you would like to enter information in the **Note Pad** *or* press **PF12**.

> General Notes:

- If you are the home budget area, submit (SUB) the form for approval.
- If you are not the home budget areas, the form will return to the home budget area when you approve (APP) the form.

Special Conditions Affecting Form Processing

If you have entered a job description number in the **Req Job Desc#** field, the following will occur:

- If the job description number is for a PS86 position or an Agricultural Extension Agent, the form will be processed upon the final approver in Phase 2.
- If the job description number is for a position other than a PS86 or Agricultural Extension Agent, the form will be processed upon the final approver in the Central Cycle.

If you did not enter a requested job description number, the following will occur:

- If the **Submit Clsf** is an **N**, the form will be processed upon the final approver in Phase 2.
- If the **Submit Clsf** is a **Y**, the form will be submitted to the Central Cycle for Salary Classification approval. When the form is approved by Salary Classification, an **AEPZ** form will be created and submitted to your approval path for **AEPZ**. This will appear as an item on the **BAFM** screen for the first approver.

If you have completed the Salary Budget Distribution and the Source/Destination of Funds screens, a budget amendment form will be created via a batch process when the form has completed the approval cycle. See above for each situation. An **ABBP** form will be submitted to the first approver. The **ABBP** will appear as an item on the **BAFM** screen.

If you are reducing a position to provide the funding for the position being created, the position being reduced will be updated when the budget amendment has completed the approval cycle.

Last Revised: 10/26/2003