

# Position Adjustment Transaction (POSA)

The **Position Adjustment Transaction** (POSA) documentation contains the following sections:

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## Introduction

During the June — July time frame each year, adjustments may be made to any **permanent** position for the new budget year. This process was formerly called Position Reallocation and was done during the month of May. New year budget adjustments will now be done on the mainframe using the Position Adjustment (POSA) transaction. POSA allows the following data to be changed:

- Home Budget
- Salary Plan (for STN and FTM positions only)
- Appt Salary (only allowed if salary plan changes or if adjusting an unfilled position)
- Distribution
- Pay Budget
- Pay Fund

The Position Adjustment transaction is comprised of five screens:

- Cover screen
- Position Adjustment screen
- Months-Not-Worked screen (only appears when salary plan is changed)
- Salary Budget Distribution screen
- Source/Destination of Funds screen

It is recommended that Position Adjustments be done **before** downloading the salary increase file to PERMSAL from the mainframe. Although it is possible to do Position Adjustments after salary increase information has been uploaded, it is not recommended because it will require the salary increase to be done again.

**> Note:**

The POSA transaction must be initiated by the Financial Officer who has financial responsibility for the home budget of the position.

**> Note:**

The POSA screen, for a given position, **must** only be accessed by **one** person at a time.

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# Cover Screen

The Cover screen is used to select the position you want to adjust by entering either a PSU ID or a position number.

## Cover Screen

```
PLEASE ENTER PSU ID OR ADMIN AREA AND POS #, THEN PRESS <ENTER>
04/26/01                POSITION ADJUSTMENTS                POSA
16:15:26.0              Cover Screen                        JWD1

          [Hand cursor] SELECT ONE

          [Arrow] PSU ID: X - XXXX - XXXX

                   OR

          [Arrow] AA/Pos #: 028 172__ - __

NEXT FUNCTION: _____ (MENU, KEYS, END)
```

### 1. PSU ID:

Enter the PSU ID (only for filled positions).

**- or -**

**AA/Pos #:**

Enter the administrative area number and position number.

**> Note:**

Only the position number may be entered for **unfilled** positions.

If you have already downloaded your data to PERMSAL, the message below will appear. You should not do any adjustments unless you are planning to download again. If you are not going to download your data again, wait until after you have uploaded your data from PERMSAL before doing the Position Adjustment. This message is simply a warning and you may choose to bypass it by pressing **PF8**.

**Message:**

**PRESS ANY PF KEY OR <ENTER> TO CONTINUE.**

**WARNING \*\* Data has been downloaded \*\* WARNING**

**You should not do a position adjustment unless you are going to re download, or wait until after you upload.**

If the position is filled, a pop-up window will appear asking "Will the position be unfilled by July 'X' ?" Where "X" will be the date that the General Salary Increase for the position will be loaded into the Payroll/IBIS file. This date will differ depending on the type of position – whether standing non-table driven and fixed term multi-year or standing table driven.

```
FILLED POSITION RECORD NOT FOUND FOR THE SPECIFIED PSU ID
05/19/03                POSITION ADJUSTMENTS                POSA
11:38:08.1                ABG2

                Cover Screen

                SELECT ONE

                PSU ID: X - XXXX - XXXX

                OR

                AA/Pos #: 004 27__ - __

                PRESS <ENTER> TO RETURN

                Will the position be unfilled by July X (Y/N)? N

                If you answer 'Y'es but the position is filled
                on July X , the GSI and POSA adjustments will
                not be applied.
```

If you answer yes to the question, the position adjustment will handle this position as though it is an unfilled position.

**> Note:**

When you answer yes to this question, IBIS will expect this position to be unfilled by July "X" or the general salary increase and position adjustment processing will not be applied to this position.

After the position has been selected, you will be prompted to press **PF8** to continue.

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## Position Adjustment Screen

### Executive (EXEC)/Academic Administrator (ACAM)/Academic (ACAD)

You may make changes to the following fields for Executive, Academic Administrator and Academic positions.

## Position Adjustment Screen

```

04/26/01          POSITION ADJUSTMENTS          POSA
16:18:03.4      ───────────────────────────▶ Main Screen          JWD1

PSU ID: X-XXXX-XXXX          Name: L0034LASTNAME,F0034F

H Admin Area: 028          Pos #: 00172 - 000          Pos Type: P
1 Home Budget: 02 - 028 - 15 UP          2 Appt Sal: 47196.00__          Pos Status: FI
Annualz Sal: 62928.00          Pos Apt Type: STN          Rank: A30
Class: ACAD          Job Desc #: AA30 - 0000          Pos FTE: 1.000
Ex/NonEx: _          ACAM/EXEC T1: NA_          Clsf Rvwd: N
Grade: NA          ACAM/EXEC T2: NA_          HRS Indc: N
3 Sal Plan: 36W          Job Desc Title: ASST PROF
Per Rep #: 320          Rank/Dspln Title: ASST PROF BIOLOGY
4 Work Loc: UP
Work Unit: NA

5 Pay Budget: 04 - 028 - 98 UP          Fndg Hld:          Adj Codes          Error Codes
6 Pay Fund: 10020          Sal Red Crcl:          Z

Pos Stat Dte: 01 / 02 / 1994

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

```

### 1. Home Budget:

The home budget can be changed to any valid home budget within the administrative area.

### 2. Appt Salary:

- For **filled** positions, the new appointment salary may be modified only if the salary plan is changing.
- For **unfilled** positions, the appointment salary is modifiable, independent of changes to the salary plan.

**> Note:**

The Appt. salary can be left as is.

### 3. Sal Plan:

The salary plan can be changed.

- It must be **monthly** for **Executives** (example: 12M).
- It must be **weekly** for **Academic Administrators and Academics** (example: 36W).

### 4. Work Loc:

The work location must be changed if the home budget changes, but otherwise will not be modifiable.

### 5. Pay Budget:

The pay budget must be changed if:

- The home budget changes and the pay budget is not the clearing account.

**> Notes:**

If there is one permanent distribution, the pay budget must be the permanent distribution or the clearing account.

- The number of distributions changes from one distribution to multiple distributions.
- The clearing account must be used if there are multiple distributions.

### 6. Pay Fund:

The pay fund must be changed in accordance with pay budget changes.

**> Note:**

When the pay budget is the clearing account, the pay fund must be 10020.

After the appropriate changes have been made, press **PF8** to continue to the next screen.

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## Administrator (ADMR), Staff Exempt (STFF), Staff Non-Exempt (STFF) and Technical Service (TECH)

You may make changes to the following fields for Administrator, Staff Exempt, Staff Non-Exempt and Technical Service positions.

### Administrator, Staff Exempt (STFF), Staff Non-Exempt (STFF) and Technical Service (TECH) Screen

```
04/26/01          POSITION ADJUSTMENTS          POSA
16:19:08.4      -----> Main Screen          JWD1

      PSU ID: X-XXXX-XXXX          Name: LQ227LASTNAME, F0227F
                                     *EXEMPT*
H Admin Area: 050          Pos #: 00102 - 000          Pos Type: P
1 Home Budget: 02 - 031 - 11 UP  2 Appt Sal: 45492.00__          Pos Status: FI
Annualz Sal: 45492.00          Pos Apt Type: STN          Rank: NA_
Class: STFF          Job Desc #: 2380 - 0000          Pos FTE: 1.000
Ex/NonEx: E          ACAM/EXEC T1: NA_          Clsf Rvwd: C
Grade: 23          ACAM/EXEC T2: NA_          HRS Indc: N
3 Sal Plan: 12M          Job Desc Title: SR_DUS PRGMS COORD_____
Per Rep #: 100          Rank/Dspln Title: _____
4 Work Loc: UP
Work Unit: 100

5 Pay Budget: 04 - 031 - 98 UP          Fndg Hld:          Adj Codes          Error Codes
6 Pay Fund: 10020          Sal Red Crcl:          Z

Pos Stat Dte: 09 / 25 / 1995

      NEXT KEY:
NEXT FUNCTION:          [MENU, KEYS, END]
```

#### 1. Home Budget:

The home budget can be changed to any valid home budget within the administrative area.

#### 2. Appt Salary:

- For **filled** positions, a new appointment salary must be entered only if the salary plan is changing.
- For **unfilled** positions, the appointment salary is modifiable independent of salary plan changes.

#### 3. Sal Plan:

The salary plan can be changed.

- It must be **monthly** for Administrator, Staff Exempt and Staff Non-Exempt positions (**example: 12M**)
- It must be **weekly** for **Technical Service** (**example: 52W**).

#### 4. Work Loc:

The work location must be changed if the home budget changes, but otherwise will not be modifiable.

**> Note:**

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

## 5. Pay Budget:

The pay budget must be changed if:

- The home budget changes and the pay budget is not the clearing account.

### > Notes:

If there is one permanent distribution, the pay budget must be the permanent distribution or the clearing account.

- The number of distributions changes from one distribution to multiple distributions.
- The clearing account must be used if there are multiple distributions.

## 6. Pay Fund:

The pay fund must be changed in accordance with pay budget changes. When the pay budget is the clearing account, the pay fund must be 10020.

After the appropriate changes have been made, press **PF8** to continue to the next screen.

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## Months-Not-Worked Screen

If the salary plan of a standing or fixed term multi-year position changes to anything less than 12 months or 48 weeks, the Months-Not-Worked screen must be completed.

### 1. Months Not Worked:

Enter the first month/day not worked through the last month/day not worked. More than one line should be used if the months are not sequential. Use the format: **MMDD — MMDD**.

#### Example:

If the months not worked are July 1 through August 31, the correct format would be:  
0701 — 0831.

## Months-Not-Worked Screen

The screenshot shows a terminal window with the following content:

```
04/26/01          POSITION ADJUSTMENTS          POSA
15:29:03.1      Months Not Worked Screen ←          JWD1

                Months Not Worked

                Beg   End
                MMDD - MMDD
1.             0000 - 0000
2.             0000 - 0000
3.             0000 - 0000
4.             0000 - 0000
5.             0000 - 0000
6.             0000 - 0000

NEXT FUNCTION:                                     (MENU, KEYS, END)
```

Arrows in the original image point to the 'Months Not Worked Screen' title and the first entry in the list.

After the appropriate changes have been made, press **PF8** to continue to the next screen.

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# Salary Budget Distribution Screen

The Salary Budget Distribution screen must be completed if the home budget or the appt. salary has been changed. It can also be used just for budget distribution changes.

All changes on this screen, except those associated with restricted funds will generate a new year permanent budget amendment for your area.

## Home Budget Area Changes

For each budget distribution that you have financial responsibility for, the following changes can be made:

### Salary Budget Distribution Screen

```

04/26/01                               POSITION ADJUSTMENT                               Screen 2.0
16:36:32.6                             SALARY BUDGET DISTRIBUTION                             POSA
                                                                                               JWD1
H Admin Area: 050                        Pos #: 00102-000                        Pos Type: P
Home Budget: 02-031-11 UP                New Pos Salary: 45492.00                Pos Status: FI

Temp Pos BA: N                            Old Pos Salary: 45492.00                Obj Code: 105

1.   Budget Fund AA# Trn Cd Sal % Sal Amnt Net Change
    1 0203111 UP 2 10010 050 3 10 4 50.0 5 10680
    2 0202403 UP 10010 024  _ 50.0  _ 22812
    3. _____
    4. _____
    5. _____
    6. _____
    7. _____
    8. _____
    9. _____
    10. _____
NEXT KEY:
NEXT FUNCTION: (HELP, MENU, END)
  
```

#### 1. Budget:

Enter the new budget number. If you are only changing the salary amount associated with budget, do not change this field.

#### > Note:

The first distribution line must be the home budget and general funds. If there is no general fund distribution to this budget and fund, enter a zero in the salary column or leave blank. (ARL is an exception to the general funds requirements.)

#### 2. Fund:

Change the fund number associated with the budget for this distribution.

#### 3. Trn Cd:

Enter a transaction code to indicate the source or destination of funding. Miscellaneous funds do not require a budget amendment; therefore, if only miscellaneous funds are used, the Source/Destination of Funds screen will not be used.

#### 4. Sal %:

Do not make an entry in Sal % column if you plan to use the Salary Amount Column.

#### 5. Sal Amnt:

Enter the salary amount applicable to this budget and fund.

> **Note:**

If you need to add a new budget distribution, go to the next blank line and follow directions above.

The Financial Officer, who has financial responsibility for the home budget of the position, must go to the next blank line and complete as follows (for budget distributions not under their financial responsibility):

```
04/26/01                POSITION ADJUSTMENT                Screen 2.0
16:33:03.2             SALARY BUDGET DISTRIBUTION             POSA
                                                                JWD1
H Admin Area: 050        Pos #: 00102-000        Pos Type: P
Home Budget: 02-031-11 UP  New Pos Salary: 45492.00    Pos Status: FI

Temp Pos BA: N          Old Pos Salary: 45492.00        Obj Code: 105

   Budget   Fund   AA# Trn Cd   Sal %   Sal Amnt   Net Change
1.   0203111 UP  10010 050   10   _50.0   10680
2.   0202403 UP  10010 024   _   _50.0   22812
3.   _____ 6    024   _   _____ 600
4.   _____ 021   _   _____ 600
5.   _____
6.   _____
7.   _____
8.   _____
9.   _____
10.  _____
NEXT KEY:
NEXT FUNCTION:                                     (HELP, MENU, END)
```

6. **AA#:**

Enter the administrative area number for which the funding is changing.

7. **Sal Amnt:**

Enter the amount of adjustment for the administrative area. This may be an increase or decrease in funding.

> **Note:**

After the Home Budget area has completed their POSA transaction, they should notify each Financial Officer involved with this position so that they can adjust their portion of the distribution. The non-home budget FO will also do their distribution changes by using the POSA transaction.

After the appropriate changes have been made, press **PF8** to continue to the next screen.

## Non-Home Budget Area Changes

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

### Non-Home Budget Area Changes Screen

04/26/01 16:36:32.6		POSITION ADJUSTMENT SALARY BUDGET DISTRIBUTION					Screen 2.0 POSA JWD1	
H Admin Area: 050		Pos #: 00102-000			Pos Type: P		Pos Status: FI	
Home Budget: 02-031-11 UP		New Pos Salary: 45492.00						
Temp Pos BA: N		Old Pos Salary: 45492.00			Obj Code: 105			
	Budget	Fund	AA#	Trn Cd	Sal %	Sal Amnt	Net Change	
1.	0203111 UP	10010	050		50.0	10680		
2.	0202403 UP	10010	024	<b>3</b> <del>10</del> <b>4</b>	<del>50.0</del> <b>5</b>	23412		
3.			024			600		
4.			021			600		
5.								
6.								
7.								
8.								
9.								
10.								
NEXT KEY:								
NEXT FUNCTION:							[HELP, MENU, END]	

If the budget and fund that you want to adjust is one of the current distributions, go to that line and change as follows:

**3. Trn Cd:**

Enter a transaction code to indicate the source or destination of funding. Miscellaneous funds do not require a budget amendment; therefore, if only miscellaneous funds are used, the Source/Destination of Funds screen will not be used.

**4. Sal %:**

Do not make an entry in Sal % column if you plan to use the Salary Amount Column.

**5. Sal Amnt:**

Enter the salary amount applicable to this budget and fund.

If the adjustment requires you to enter a new distribution, go to the line with your administrative area number listed and change as follows:

04/26/01 16:36:32.6		POSITION ADJUSTMENT SALARY BUDGET DISTRIBUTION					Screen 2.0 POSA JWD1	
H Admin Area: 050		Pos #: 00102-000			Pos Type: P		Pos Status: FI	
Home Budget: 02-031-11 UP		New Pos Salary: 45492.00						
Temp Pos BA: N		Old Pos Salary: 45492.00			Obj Code: 105			
	Budget	Fund	AA#	Trn Cd	Sal %	Sal Amnt	Net Change	
1.	0203111 UP	10010	050		50.0	10680		
2.	0202403 UP	10010	024	10	50.0	23412		
3.			024			600		
4.	<b>1</b> 0202155 UP <b>2</b>	10010	021	<b>3</b> 10	<b>4</b> <b>5</b>	600		
5.								
6.								
7.								
8.								
9.								
10.								
NEXT KEY:								
NEXT FUNCTION:							[HELP, MENU, END]	

**1. Budget:**

Enter the budget number for this distribution.

**2. Fund:**

Enter the fund number associated with the budget for this distribution.

**3. Trn Cd:**

Enter a transaction code to indicate the source or destination of funding. Miscellaneous funds do not require a budget amendment; therefore, if only miscellaneous funds are used, the Source/Destination of Funds screen will not be used.

**4. Sal %:**

Do not make an entry in Sal % column if you plan to use the Salary Amount Column.

**5. Sal Amnt:**

Enter the salary amount applicable to this budget and fund.

**> Notes:**

- If the home budget area entered a line containing your administrative area number and an amount in the Sal Amnt column and you have not entered anything on this line, remove the information by blanking out all the fields on that line.
- If you are going to split the amount that your area is responsible for between two or more budget/fund combinations, go to the next available blank line and fill in as above.

After the appropriate changes have been made, press **PF8** to continue to the next screen.

## Source/Destination of Funds Screen

Fill in only information that corresponds to the distribution changes within your area of financial responsibility.

### Source/Destination of Funds Screen

```

04/26/01          POSITION ADJUSTMENT          Screen 3.0
16:51:45.1      SOURCE/DESTINATION OF FUNDS  POSA
                                                    JWD1
H Admin Area: 050          Pos #: 00102-000    Pos Type: P
Home Budget: 02-031-11 UP  New Pos Salary: 45492.00  Pos Status: FI

GENERAL FUNDS:
AG FED. FUNDS:          Fndg Eff Dte: 07 / 01 / 2001
AUXILIARY ENT:
UNIV SERV:             Auto/Bat BA(A/B): A
INTRA UNIV:
SOURCE/DESTINATION    BUDGET  FUND  CD  CD  Incr /  Position  Pos  BA
                   BUDGET  FUND  CD  CD  (-)DECR  AA#  #  SUF  AMOUNT  TYP
1.      0202155 UP 10010 12B  10  -6000  6
2.      1          2    3    4    5
3.      1          2    3    4
4.
5.
6.
7.
MORE BUDGETS : N
NEXT KEY:
NEXT FUNCTION:
(MENU, KEYS, END)

```

If you removed a budget from the Salary Budget Distribution screen, the reduction will automatically appear on this screen. For each line that automatically appears complete as follows, using only step 4:

**4. Trn Cd:**

Enter the transaction code.

Enter one line for each new budget, fund and object category funding source or destination.

1. **Budget:**

Enter the budget number to be increased or decreased.

2. **Fund:**

Enter the fund number to be increased or decreased.

3. **Obj Cd:**

Enter the University object code to be increased or decreased.

4. **Trn Cd:**

Enter the transaction code. The transaction code for each distribution must match the corresponding transaction code that was entered on the Salary Budget Distribution screen.

5. **Incr / (-)Decr:**

Type in the amount to be increased or decreased to each budget, fund and object code.

6. **Position #:**

If you want the source/destination of funding to adjust another position, type in the position number to be adjusted. IBIS will expect this position to be unfilled by the date that the General Salary Increase for the position will be loaded into the Payroll/IBIS file (or the general salary increase and position adjustment processing will not be applied to this position).

> **Notes:**

- The position number entered must have a distribution with the same budget and fund that appears on that line. If the position salary is being decreased, there must be enough funds to cover the decrease.
- If the position number entered is a filled position, it must have been flagged that it would be unfilled by the date that the General Salary Increase for the position will be loaded into the Payroll/IBIS file. If you get the message, "ERROR: THIS POSITION IS FILLED" and it is going to be unfilled, use POSA to change the flag.

After the appropriate changes have been made, press **PF12** to process the transaction.

---

## Processing the Transaction

After pressing **PF12**, you will be returned to the cover screen. A message will be displayed at the top of the screen, informing you that the position has been updated.

If a budget amendment was created by the transaction, a message will appear informing you that the budget amendment file and BUDDEV were updated.

## Processing the Transaction Screen

**POSN #050 00102 000' UPDATED**

04/26/01  
16:15:26.0



POSITION ADJUSTMENTS  
Cover Screen

POSA  
JWD1

SELECT ONE

**PSU ID: X - XXXX - XXXX**

**OR**

**AA/Pos #: \_\_\_ - \_\_\_ - \_\_\_**

NEXT FUNCTION:

[ MENU, KEYS, END]

Last Revised: 04/06/2007