

Position Management: Changing or Collapsing an Academic Position (UAPM)

The **UAPM** form can be used by the Human Resource Representative or Financial Officer to **change or collapse an academic standing or fixed-term multi-year position that is not filled.**

```
12/10/98          INTEGRATED BUSINESS INFORMATION SYSTEM          M1M1
15:07:49.2                                             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: uapm_1          PREV MENU: NONE
nter-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 **UAPM**.

Press **Enter**.

> Note:

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


```

PLEASE CHANGE CLASS AND/OR APT TYPE - OR - PRESS ENTER TO CONTINUE
12/10/98                               POSITION MANAGEMENT FORM           Screen 1.0
15:17:10.4                             UPDATE ACADEMIC POSITION           UAPM
                                          DAM3
Form Action: ADD      Document #:          Unit:          Confidential: Y
Effective Date: 01 / 01 / 1999           Document Status:

H Admin Area: 004                               Pos #: 114 - 000      5 Pos Type: P
Home Budget: 04 - 004 - 99 UP      App Salary: 75428.00__  Pos Status: UN

6 Class: ACAD                               7 Pos Apt Type: STN           Rank: A10
Grade: NA                               Job Desc #: RA10 - _____ Pos FTE: 1.000
Sal Plan: 36W                          ACAM/EXEC T1: NA_
Per Rep #: 020                          ACAM/EXEC T2: NA_
Work Loc: UP - _____              Acad Title: PROF _____

Collapse Pos: N                          Adm Pos Hid: N           Mult-apt Pos: N
Cen Pos Hid: N                          Clsf Pos Hid: N         Sal Red Crcl: N

Pos Stat Dte: 10 / 31 / 1992

```

At this time you can make changes to the following fields:

- At Pos Type, type in the new position type if it is changing.

> Note:

Standing and fixed-term multi-year positions must be permanently funded.

- At Class, type in the new personnel class if it is changing.

> Note:

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

- At Pos Apt Type, type in the new position appointment type if it is changing.

> Note:

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

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

Required fields may vary depending upon the class and appointment type:

Academic Administrators:

```

PLEASE CHANGE CLASS AND/OR APT TYPE - OR - PRESS ENTER TO CONTINUE
12/10/98          POSITION MANAGEMENT FORM          Screen 1.0
15:46:39.7      UPDATE ACADEMIC POSITION          UAPM
                                                    DAM3
Form Action: ADD   Document #:                Unit:                Confidential: Y
Effective Date: 01 / 01 / 1999                Document Status:

H Admin Area: 004                               Pos #: _1095 - 000    Pos Type: P
1 Home Budget: 02 - 004 - 12 UP 2 App Salary: 98088.00__ Pos Status: UN

Class: ACAM                                     Pos Apt Type: STN    3 Rank: A10
Grade: NA                                       Job Desc #: DE10 - ____ Pos FTE: 1.000
4 Sal Plan: 48W                                5 ACAM/EXEC T1: E10
6 Per Rep #: 020                               7 ACAM/EXEC T2: NA_
8 Work Loc: UP - ____                          Acad Title: PROF _____

Collapse Pos: N                               Adm Pos Hid: N      Mult-apt Pos: N
Gen Pos Hid: N                               Clsf Pos Hid: N    Sal Red Crcl: N

Pos Stat Dte: 07 / 01 / 1996

```

1. At **Home Budget**, type in the new budget number if the home budget is changing.
2. At **App Salary**, type in the new annual salary if it is changing.
3. At **Rank**, type in the new rank if it is changing.

> Note:

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

4. At **Sal Plan**, type in the new salary plan if it is changing. Type in the number of weeks for academic administrators (ex. 36W).
5. At **Acam/Exec T1**, type in the new code for the primary University title if it is changing.

> Note:

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

6. At **Per Rep #**, type in the new Human Resource Representative number if it is changing.

> Note:

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

7. At **Acam/Exec T2**, type in the new code for the secondary or dual University title if it is

changing.

> Note:

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

8. At **Work Loc**, type in the new physical work location if it is changing.

> Note:

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

Academic

```
PLEASE CHANGE CLASS AND/OR APT TYPE - OR - PRESS ENTER TO CONTINUE
12/10/98                               POSITION MANAGEMENT FORM           Screen 1.0
15:17:10.4                             UPDATE ACADEMIC POSITION             UAPM
                                          DAM3
Form Action: ADD      Document #:          Unit:          Confidential: Y
Effective Date: 01 / 01 / 1999           Document Status:

H Admin Area: 004                      Pos #: 114 - 000          Pos Type: P
1 Home Budget: 04 - 004 - 99 UP 2 App Salary: 76428.00__ Pos Status: UN

Class: ACAD                            Pos Apt Type: STN          3 Rank: A10
Grade: NA                               Job Desc #: AA10 - _____ Pos FTE: 1.000
4 Sal Plan: 36W                          ACAM/EXEC T1: NA_
6 Per Rep #: 020                          ACAM/EXEC T2: NA_
8 Work Loc: UP - _____ 9 Acad Title: PROF _____

Collapse Pos: N                          Adm Pos Hid: N            Mult-apt Pos: N
Cen Pos Hid: N                          Clsf Pos Hid: N          Sal Red Crcl: N

Pos Stat Dte: 10 / 31 / 1992
```

1. At **Home Budget**, type in the new budget number if the home budget is changing.

2. At **App Salary**, type in the new annual salary if it is changing.

3. At **Rank**, type in the new rank if it is changing.

> Note:

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

4. At **Sal Plan**, type in the new salary plan if it is changing.

6. At **Per Rep #**, type in the new Human Resource Representative number if it is changing.

> Note:

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

8. At **Work Loc**, type in the new physical work location if it is changing.

> Note:

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

9. At **Acad Ttl**, type in the new academic discipline if it is changing.

Press **PF8**.

Since this may be a position distribution change, this screen may be the increase or decrease side of your budget amendment. This screen may be changed anywhere in the approval cycle. However, this screen must be changed before final Financial Officer approval.

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

You may make the following changes to the Salary Budget Distribution screen:

12/11/98	POSITION MANAGEMENT					Screen 2.0	
11:36:18.5	SALARY BUDGET DISTRIBUTION					UAPM	
H Admin Area: 074			Pos #: 00059-000		DAM3		
Home Budget: 02-017-35 HY			New Pos Salary: 86680.00		Pos Type: P		
Temp Pos BA: N			Old Pos Salary: 76680.00		Pos Status: UN		
Obj Code: 103							
	Budget	Fund	AA#	Trn Cd	Sal %	Sal Amnt	Net Change
1.	① 0201735 HY	② 10010	074	③	④ 8.5	⑤ 76680	
2.		⑥ 015			11.5	⑦ 10000	10000.00
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							
NEXT KEY:							
NEXT FUNCTION:						(HELP, MENU, END)	

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

1. At **Budget**:

- 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.

2. If you are only changing the amount associated with the budget, do not change this field.

3. If you are changing a budget, enter the new budget number for this distribution.

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

> Note:

For miscellaneous funds, leave this field 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.
- For budget distribution(s) not under your financial responsibility:

6. At **AA#**, type in the administrative area number for which the funding is changing.

7. At **Sal Amnt**, type in the amount of adjustment for the administrative area.

> Note:

This may be an increase **or** a decrease in funding.

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

Non-home budget area:

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

follows:

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

```
12/11/98                               POSITION MANAGEMENT                               Screen 2.0
11:36:18.5                             SALARY BUDGET DISTRIBUTION                             UAPM
                                                                                               DAM3
H Admin Area: 074                         Pos #: 00059-000                               Pos Type: P
Home Budget: 02-017-35 HY                 New Pos Salary: 86680.00                       Pos Status: UN

Temp Pos BA: N                            Old Pos Salary: 76680.00                       Obj Code: 103

      Budget   Fund   AA#   Trn Cd   Sal %   Sal Amnt   |   Net Change
1.    0201735 HY  10010  074    3    8.5    76680 |
2.    _____  _____  _____  _____  _____  _____ |   10000.00
3.    _____  _____  _____  _____  _____  _____ |
4.    _____  _____  _____  _____  _____  _____ |
5.    _____  _____  _____  _____  _____  _____ |
6.    _____  _____  _____  _____  _____  _____ |
7.    _____  _____  _____  _____  _____  _____ |
8.    _____  _____  _____  _____  _____  _____ |
9.    _____  _____  _____  _____  _____  _____ |
10.   _____  _____  _____  _____  _____  _____ |

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

3. At **Trn Cd**, type in the transaction code indicating the source of funds.

> Note:

For miscellaneous funds, leave this field 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 the adjustment requires you to enter a new distribution, go to the line with your administrative area number listed and change the following:


```

12/11/98                               POSITION MANAGEMENT                               Screen 2.0
11:36:18.5                             SALARY BUDGET DISTRIBUTION                             UAPM
                                                                                               DAM3
H Admin Area: 074                       Pos #: 00059-000                               Pos Type: P
Home Budget: 02-017-35 HV               New Pos Salary: 86680.00                       Pos Status: UN

Temp Pos BA: N                           Old Pos Salary: 76680.00                       Obj Code: 103

   Budget  Fund  AA# Trn Cd  Sal %  Sal Amnt  | Net Change
1.  ① 0201735 HV ② 10010 074 ③ - ④ 9.5 ⑤ 76680 |
2.  _____  _____  _____  _____  _____  _____ | 10000.00
3.  _____  _____  _____  _____  _____  _____ |
4.  _____  _____  _____  _____  _____  _____ |
5.  _____  _____  _____  _____  _____  _____ |
6.  _____  _____  _____  _____  _____  _____ |
7.  _____  _____  _____  _____  _____  _____ |
8.  _____  _____  _____  _____  _____  _____ |
9.  _____  _____  _____  _____  _____  _____ |
10. _____  _____  _____  _____  _____  _____ |

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

```

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.

> Note:

For miscellaneous funds, leave this field 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.

> Note:

If the adjustment did not require you to use the line that the home Financial Officer entered on this screen, remove the line before sending the form back to the home Financial Officer.

Press **PF8**.

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

> Note:

This screen will not appear for miscellaneous funds.

This screen may be the increase or decrease side of the budget amendment.

If you removed a budget from the Budget Distribution screen, the reduction will automatically appear on the Source/Destination of Funds screen.

```
12/11/98                POSITION MANAGEMENT                Screen 3.0
11:41:55.9             SOURCE/DESTINATION OF FUNDS        UAPM
                                                                DAM3
H Admin Area: 004                Pos #: 00114-000        Pos Type: P
Home Budget: 04-004-99 UP      New Pos Salary: 86428.00    Pos Status: UN

GENERAL FUNDS: 10000                BA#:
AG FED. FUNDS:                    Fndg Eff Dte: 01 / 01 / 1999    BA#:
AUXILIARY ENT:                    BA#:
  UNIV SERV:                      Auto/Bat BA(A/B): A            BA#:
  P.L. 94-482:                    BA#:

SOURCE/DESTINATION              Obj Trn   Incr /   Position
                               Cd   Cd   (-)Decr  AA#   #   Suf   Pos   BA
                               ① ② ③ ④ ⑤ ⑥
1. ① 0400499 U ② 100 ③ 11B ④ 10 ⑤ 10000 004 ⑥  _  _  Amount Typ
2.  _  _  _  _  _  _  _  _  _  _  _  _  _  _
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.
- For each line that automatically appears on the screen, complete as follows:
 4. At **Trn Cd**, type in the transaction code.

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

1. At **Budget**, type in the budget number to be increased or decreased.
2. At **Fund**, type in the fund number to be increased or decreased.
3. At **Obj Cd**, type in the University object code to be increased or decreased.
4. At **Trn Cd**, type in the transaction code.

> Note:

This code must be the same transaction code entered on the previous screen - Salary Budget Distribution **or** entered on the line that automatically appeared on this screen.

- At **Incr/(-)Dec**, type in the amount. This may be an increase or decrease to this budget, fund and object code.
- At **Position #**, if you are reducing an unfilled position to fund this position, type in the position number you are reducing.

Press **PF8** if you want to enter additional information in the Note Pad; if not, press **PF12**.

> General Notes:

- If you are the home budget area, sub (SUB) the form for approval.
- If you are not the home budget area, the form will return to the home budget area when you approve (APP) the form.
- When the form has completed the approval cycle, a budget amendment will be created via a batch process. This form will be submitted to the first approver for **AABP**. The **AABP** will appear as an item on the **BAFM** screen.
- If you are reducing a position to provide funding, the position being reduced will be updated when the budget amendment has completed the approval cycle.

Last Revised: 10/26/2003