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.

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.
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 make changes to your funding.

2. At **Eff Date**, type in the date you want the form to update the database. The effective date must be the same or earlier than the appointment begin date of the employee filling the position.

3. At **H Admin Area**, type in the administrative area of the position you are updating.

4. At **Pos #**, type in the position number you want to update.

10. At **Collapse Pos**, type in a **Y** if you want to collapse this position.

Press the **Enter** key to retrieve the balance of information on this position.
At this time you can make changes to the following fields:

5. 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.

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

   > Note:
   Press PF1 to view the appropriate class codes.

7. 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:**
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.

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### Academic

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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  App Salary: 76428.00__  Pos Status: UN

Class: ACRD  Pos Apt Type: STN  Rank: A10
Grade: NA  Job Desc #: A10 - ___  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 Hld: N  Multi-apt Pos: N
Cen Pos Hld: N  Clsf Pos Hld: N  Sal Red Crc1: N

Pos Stat Dte: 10 / 31 / 1992
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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:

- 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.

4. 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
● If the budget and fund that you want to adjust is one of the current distributions, go to that line and change as follows:

<table>
<thead>
<tr>
<th>Budget</th>
<th>Fund</th>
<th>RA# Trn Cd</th>
<th>Sal %</th>
<th>Sal Amnt</th>
<th>Net Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>0201735 HY</td>
<td>10010</td>
<td>074</td>
<td>3</td>
<td>4</td>
</tr>
</tbody>
</table>

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:
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.

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