Position Management: Changing or Collapsing a Non-Academic Position (UEPM)

The UEPM form can be used by the Human Resource Representative or Financial Officer to change or collapse a non-academic standing or fixed-term position that is not filled.

1. At Next Function on M1M1, type UEPM.

   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 effective date of the change. 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.

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

Press the **Enter** key to retrieve the balance of information about 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 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.

8. At **Ex/Nonex** if Class = STFF, type in the new exempt/non-exempt code if it is changing.

   > **Note:**
   Press PF1 to view the appropriate exempt/non-exempt codes.

Press the **Enter** key to establish the edits for the position being updated.
Required fields may vary depending upon the appointment type:

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

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

3. At **Rank**, type in the new rank if it is changing for Agricultural Extension Agents and Administrators.

   > **Note:**
   
   Press **PF1** for a list of valid rank codes.

4. At **Bud Grade**, type in the new grade if it is changing.

   > **Note:**
   
   Press **PF1** to list the valid grades.

5. At **Req Job Desc#**, type in the new job description number being requested if there is one already established.

6. At **Sal Plan**, type in the new salary plan if it is changing.
**Note:**
Type in the monthly plan for Administrators and Staff. For Technical Service, type in the weekly plan (ex. 52W).

7. At **Bud Job Titl** for positions that have not been classified, type in the new requested personnel job title if it is changing.

8. 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.

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

> **Note:**
Press **PF1** to list the valid location codes.

10. At **Work Unit**, type in the new work unit if it is changing.

> **Note:**
Press **PF1** to list the valid work units.

11. At **Submit Clsf**, if you want the position reclassified or classification to begin, type in a **Y**. This will send the form to Salary Classification for classification. If there is no change in the classification or you do not want the position classified, type in an **N**.

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.

- 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:

  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.

**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 **UEPZ** form will be created and submitted to your approval path for **UEPZ**. 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.

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