

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.**

```
12/11/98          INTEGRATED BUSINESS INFORMATION SYSTEM          M1M1
11:45:31.8                                             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: uepm_1          PREV MENU: NONE
inter-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 **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.

```

PLEASE ENTER ADMIN AREA AND POSITION #, THEN PRESS ENTER
12/11/98                               POSITION MANAGEMENT FORM           Screen 1.0
11:49:54.9                             UPDATE/EVALUATE POSITION             UEPM
                                          DAM3
Form Action: add 1 Document #:          Unit:          Confidential: Y
Effective Date: 01 / 01 / 1999 2      Document Status:
H Admin Area: 004 3                      4 Pos #: 77__ - 000      Pos Type: -
Home Budget: __ - __ - __      App Salary: _____      Pos Status:
Class: _____      Pos Apt Type: _____      Rank: _____
Ex/Nonex: -            Job Desc #: _____      Pos FTE: _____
Grade: _____      Req Job Desc #: _____ - ____0      Clsf Rvwd:
Sal Plan: _____      Job Desc Ttl: _____
Per Rep #: _____
Work Loc: __ - __
Work Unit: _____
12 Collapse Pos: N            Adm Pos Hld: -            Mult-apt Pos: N
Cen Pos Hld:                Clsf Pos Hld:            Sal Red Crcl:
                               Pos Stat Dte: / /        Submit Clsf: N
Approved Classification
Job Desc #: _____ - _____      OHR Log #: _____      Class:
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 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.

```

PLEASE CHANGE CLASS AND/OR APT TYPE - OR - PRESS ENTER TO CONTINUE
12/11/98                               POSITION MANAGEMENT FORM           Screen 1.0
13:12:39.0                             UPDATE/EVALUATE POSITION           UEPM
                                          DAM3
Form Action: ADD      Document #:          Unit:          Confidential: Y
Effective Date: 01 / 01 / 1999           Document Status:

H Admin Area: 004                               Pos #: ___77 - 000      5 Pos Type: P
Home Budget: 05 - 004 - 99 UP   App Salary: 55056.00__   Pos Status: UN

6 Class: STFF                                7 Pos Apt Type: STN           Rank: X10
8 Ex/Nonex: E                               Job Desc #: 9993 -         Pos FTE: 1.000
Grade: 25                                   Req Job Desc #: ___ - ___0   Clsf Rvwd: C
Sal Plan: 12M                               Job Desc Ttl: SR EXT AGT_____

Per Rep #: 020
Work Loc: UP - ___
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
                                          Pos Stat Dte: 04 / 30 / 1997   Submit Clsf: Y
Approved Classification
Job Desc #: ___ - ___   OHR Log #: ___   Class:          Grade:
Job Title:              Rank:          EEO:

```

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 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.

- 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.

```

VERIFY WORK UNIT, WORK LOC; ENTER ANY DESIRED DATA ELEMENTS; PRESS PF8
09/14/99          POSITION MANAGEMENT FORM          Screen 1.0
13:21:11.7       UPDATE/EVALUATE POSITION          UEPM
                                                         DAM3
Form Action: ADD   Document #:          Unit:          Confidential: Y
Effective Date: 09 / 01 / 1999          Document Status:

H Admin Area: 004          Pos #: _2754 - 000          Pos Type: P
1 Home Budget: 02 - 004 - 66 UP 2 Bud Salary: 12000.00__          Pos Status: UN

Bud Class: STFF          Pos Apt Type: STN          3 Rank: NA_
Ex/Nonex: E          Job Desc #: -          Pos FTE: 1.000
4 Bud Grade: 20          5 Req Job Desc #: ___ - ___0          Clsf Rvwd: U
6 Sal Plan: 12M          7 Bud Job Title: LEAD PROGRAMMER/ANALYST__

8 Per Rep #: 020
9 Work Loc: UP - ___
10 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
                                                         11 Submit Clsf: Y

Pos Stat Dte: 01 / 01 / 1999
Approved Classification
Job Desc #: ___ - ___          OHR Log #: ___          Class:          Grade:
Job Title:          Rank:          EEO:

```

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:

```

12/11/98                POSITION MANAGEMENT                Screen 2.0
13:23:40.5             SALARY BUDGET DISTRIBUTION        UEPM
                                                                DAM3
H Admin Area: 004                Pos #: 00077-000        Pos Type: P
Home Budget: 05-004-99 UP      New Pos Salary: 60056.00    Pos Status: UN

Temp Pos BA: N                Old Pos Salary: 55056.00    Obj Code: 105

   Budget   Fund   AA#   Trn Cd   Sal %   Sal Amt   Net Change
1.  10500499 UP  20010  004   3   10   491.7   55056   |
2.  _____  _____  _____  _____  _____  _____  |
3.  _____  _____  _____  _____  _____  _____  |
4.  _____  _____  _____  _____  _____  _____  |
5.  _____  _____  _____  _____  _____  _____  |
6.  _____  _____  _____  _____  _____  _____  |
7.  _____  _____  _____  _____  _____  _____  |
8.  _____  _____  _____  _____  _____  _____  |
9.  _____  _____  _____  _____  _____  _____  |
10. _____  _____  _____  _____  _____  _____  |

```

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

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 13:32:24.8		POSITION MANAGEMENT SALARY BUDGET DISTRIBUTION				Screen 2.0 UEPM DAM3	
H Admin Area: 004		Pos #: 00077-000		Pos Type: P		Pos Status: UN	
Home Budget: 05-004-99 UP		New Pos Salary: 60056.00					
Temp Pos BA: N		Old Pos Salary: 55056.00		Obj Code: 105			
	Budget	Fund	AA#	Trn Cd	Sal %	Sal Amnt	Net Change
1.	1 0500499 UP	2 10010	004	3	4 91.7	5 55056	
2.	0202828 UP	10010	028		8.3	5000	5000.00
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:
 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
13:27:26.1                             SOURCE/DESTINATION OF FUNDS                          UEPM
                                                                                               DAM3
H Admin Area: 004                       Pos #: 00077-000                               Pos Type: P
Home Budget: 05-004-99 UP               New Pos Salary: 60056.00                       Pos Status: UN

GENERAL FUNDS:                               BA#:
AG FED. FUNDS:                               BA#:
AUXILIARY ENT:                               BA#:
  UNIV SERV:                               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.    ① 202828 U② 1001 ③ 11B ④ 0 ⑤ .5000 028 ⑥  -  -  -  P
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.

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.

Last Revised: 10/26/2003