

# Position Management: Changing or Collapsing a Position Transaction (UTPM)

The **UTPM transaction** can be used by the Financial Officer to **change or collapse (fast) all standing and fixed-term positions that are not filled.**

**> Note:**

If the position change will affect a position that is split with another administrative area, you must use one of the forms (UAPM or UEPM) to make the change.

```
12/11/98          INTEGRATED BUSINESS INFORMATION SYSTEM          M1M1
13:35:09.7                                             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              BAMM             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: utpm 1                                PREV MENU: NONE
Enter-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 **UTPM**.

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 TRANSACTION          Screen 1.0
13:38:14.6                             UPDATE POSITION                               UTPM
                                                                                               DAM3

H Admin Area: 004 ①                      ② Pos #: 114__ - 000                      Pos Type: _
Home Budget: _ - _ - _                      App Salary: _                               Pos Status:
Annualz Sal:                               Name:
Class: _                                   Pos Apt Type: _                            Rank: _
Ex/Nonex: _                               Job Desc #: _ - _                          Pos FTE: _
Grade: _                                   ACAM/EXEC T1: _                            Clsf Rvwrd:
Sal Plan: _                               ACAM/EXEC T2: _
Per Rep #: _                               Job Desc Ttl: _
Work Loc: _ - _                           Acad Title: _
Work Unit: _
⑭ Collapse Pos: N                        Adm Pos Hld: _                            Mult-apt Pos: N
Cen Pos Hld:                               Clsf Pos Hld:                             Sal Red Crcl:
Pos Beg Dte: _ / _ / _                    Pos End Dte: / /                          Fndg Hld:
Prt Form: _                               Pos Stat Dte: / /                          Submit Cls: N

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

```

Enter the following information:

1. At **H Admin Area**, type in the administrative area of the position you are updating.
2. At **Pos#**, type in the position number you want to update.
14. 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 TRANSACTION      Screen 1.0
13:45:10.4                             UPDATE POSITION                               UTPM
                                                DAM3

H Admin Area: 004                      Pos #: 77 - 000      3 Pos Type: E
Home Budget: 05 - 004 - 99 UP          App Salary: 55056.00 Pos Status: UN
Annualz Sal: 55056.00                  Name:
4 Class: STFF                          5 Pos Apt Type: STN      Rank: X10
6 Ex/Nonex: E                          Job Desc #: 9993 -   Pos FTE: 1.000
Grade: 25                               ACAM/EXEC T1: NA_    Clsf Rvwd: C
Sal Plan: 12M                           ACAM/EXEC T2: NA_
Per Rep #: 020                          Job Desc Ttl: SR EXT AGT_____
Work Loc: UP - _____              Acad Title: _____
Work Unit: 020

Collapse Pos: N                        Adm Pos Hld: N      Mult-apt Pos: N
Cen Pos Hld: N                        Clsf Pos Hld: N     Sal Red Crcl: N
Pos Beg Dte: 01 / 01 / 1900          Pos End Dte: 12 / 31 / 2099  Fndg Hld: N

Prt Form: _                            Pos Stat Dte: 04 / 30 / 1997 Submit Cls: N

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

```

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

3. 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.

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

**> Note:**

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

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

**> Note:**

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

6. 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 continue.

You may make changes to the following fields.

**> Note:**

These changes may vary depending on the class and appointment type.

**Executive/Academic Administrators:**

```
PLEASE CHANGE CLASS AND/OR APT TYPE - OR - PRESS ENTER TO CONTINUE
12/11/98                               POSITION MANAGEMENT TRANSACTION      Screen 1.0
14:31:46.8                             UPDATE POSITION                               UTPM
                                                                                               DAM3

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
Annualz Sal: 98088.00                    Name:
Class: ACAM                               Pos Apt Type: STN                3 Rank: A10
Ex/Nonex: E                               Job Desc #: DE10 - _____  Pos FTE: 1.000
Grade: NA                                 5 ACAM/EXEC T1: E10             Clsf Rvwd: N
6 Sal Plan: 48W                            7 ACAM/EXEC T2: NA_
8 Per Rep #: 020                           Job Desc Ttl: _____
10 Work Loc: UP - _____                Acad Title: PROF _____
Work Unit: NA_
Collapse Pos: N                            Adm Pos Hid: N                   Mult-apt Pos: N
Cen Pos Hid: N                             Clsf Pos Hid: N                  Sal Red Crcl: N
Pos Beg Dte: 01 / 01 / 1900                Pos End Dte: 12 / 31 / 2099     Fndg Hid: N

Prt Form: _                               Pos Stat Dte: 07 / 01 / 1996    Submit Cls: N

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

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 valid rank codes.

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

**> Note:**

Type in months for executive (ex. 12M) or the number of weeks for academic administrators (ex. 36W).

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 **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.

10. 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
12/11/98                               POSITION MANAGEMENT TRANSACTION          Screen 1.0
14:34:07.8                             UPDATE POSITION                               UTPM
                                                                                               DAM3

H Admin Area: 004                      Pos #: 114 - 000                      Pos Type: E
1 Home Budget: 04 - 004 - 99 UP 2 App Salary: 76428.00__ Pos Status: UN
  Annualz Sal: 101904.00                Name:
  Class: ACAD                            Pos Apt Type: STN                      3 Rank: A10
  Ex/Nonex: E                            Job Desc #: AA10 - _____        Pos FTE: 1.000
  Grade: NA                              ACAM/EXEC T1: NA_                     Clsf Rvwd: N
6 Sal Plan: 36W                          ACAM/EXEC T2: NA_
8 Per Rep #: 020                          Job Desc Ttl: _____
10 Work Loc: UP - _____              11 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 Beg Dte: 01 / 01 / 1900              Pos End Dte: 12 / 31 / 2099          Fndg Hid: N

Prt Form: _                             Pos Stat Dte: 10 / 31 / 1992 Submit Cls: N

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

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 valid rank codes.

6. At **Sal Plan**, type in the new salary plan 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.

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

**> Note:**

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

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

**Administrators, Staff and Technical Service:**

```
09/14/99          POSITION MANAGEMENT TRANSACTION          Screen 1.0
14:46:25.0          UPDATE POSITION                          UTPM
                                                           DAM3

H Admin Area: 004          Pos #: ___77 - 000          Pos Type: P
1 Home Budget: 05 - 004 - 99 UP 2 Bud Salary: 55056.00__ Pos Status: UN
  Annualz Sal: 55056.00          Name:
  Bud Class: STFF          Pos Apt Type: STN          3 Rank: X10
  Ex/Nonex: E          Job Desc #: ___ - ___          Pos FTE: 1.000
4 Bud Grade: 25          ACAM/EXEC T1: NA_          Clsf Rvwd: U
6 Sal Plan: 12M          ACAM/EXEC T2: NA_
8 Per Rep #: 020          9 Bud Job Title:          ENT_____
10 Work Loc: UP - ___          Acad Title:          _____
12 Work Unit: 020
Collapse Pos: N          Adm Pos Hld: N          Mult-apt Pos: N
Cen Pos Hld: N          Clsf Pos Hld: N          Sal Red Crcl: N
Pos Beg Dte: 01 / 01 / 1900  Pos End Dte: 12 / 31 / 2099  Fndg Hld: N

Prt Form: _          Pos Stat Dte: 04 / 30 / 1997 Submit Cls: N 13

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

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 budget grade if it is changing.

**> Note:**

Press **PF1** to list the valid grades.

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

**> Notes:**

- Type in the the monthly plan for Administrators and Staff.
- For Technical Service, type in the weekly plan (ex. 52W).

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 **Bud Job Titl**, type in the new personnel job title if it is changing.

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

**> Note:**

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

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

**> Note:**

Press **PF1** to list the valid work codes.

13. At **Submit Clsf**, if you want the classification to begin or have the position re-evaluated, type in a

Y.

**> Note:**

This will create a **UEPY** form and will submit to the approval path for **UEPY**.

Press **PF8**.

Since this may be a position distribution change, this screen may be the increase or decrease side of your budget amendment.

If this position change will affect the split in another administrative area that you are not responsible for, you must use one of the forms (**UEPM or UAPM**) to make the change.

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
14:24:58.1             SALARY BUDGET DISTRIBUTION          UTPM
                                                                DAM3
H Admin Area: 004                Pos #: 00077-000        Pos Type: P
Home Budget: 05-004-99 UP      New Pos Salary: 65056.00  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.  0500499 UP  10010  004    10    100.0    65056    10000.00
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.

- If you are only changing the amount associated with the budget, do not change this field.
  - If you are changing a budget, enter the new budget number for this distribution.
2. At **Fund**, change the fund number associated with the budget for this distribution.
  3. 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.
- If you are adding additional budget distribution(s), go to the next available blank line and complete as follows:
  1. At **Budget**, type in the budget number for this distribution.
  2. At **Fund**, type in the fund number associated with the budget for this distribution.
  3. At **Trn Cd**, type in the transaction code indicating the source of funds.

**> Note:**

Miscellaneous funds do not require a budget amendment.

4. At **Sal %**, **DO NOT** type in this column.
5. At **Sal Amnt**, type in the amount to be budgeted to this budget and fund.

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
14:27:54.3      SOURCE/DESTINATION OF FUNDS  UTPM
                                                         DAM3
H Admin Area: 004          Pos #: 00077-000    Pos Type: P
Home Budget: 05-004-99 UP  New Pos Salary: 65056.00  Pos Status: UN

GENERAL FUNDS: 10000          BA#:
AG FED. FUNDS:                Fndg Eff Dte: 12 / 11 / 1998  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 ② ③ ④ ⑤ ⑥  Amount  Typ
1.  0500499 U 1001 11E 10 10000 004 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:

- 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.

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

Press **PF12** to complete the transaction and update the database. A budget amendment will be created via a batch process that evening and submitted to your approval path for **AABP**. The **AABP** will appear as an item on the **BAFM** screen for the first approver.

The following message will appear:

**"POSN # updated and Budget Amendment submitted."**

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