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.

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.
Enter the following information:

1. At **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.
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:**

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.

4. 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.

5. 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:**

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:

![Image of a form with fields and codes]
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:**
   > o Type in the the monthly plan for Administrators and Staff.
   > o 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
> 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:

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.

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