### Overview

This guide will show you how to maintain existing position data. It will include steps on updating vacant and filled positions, including updating incumbent data both with the position management functionality and manually using job data.
Notice about the new version of PeopleSoft
All page shots used in this guide are from the previous version of PeopleSoft (HCM 8.9). Please be advised that from the fourth week of February 2012, we are using the new version of PeopleSoft (HCM 9.0) and you may experience a difference in the way the new pages look and feel.

In the new version of PeopleSoft (HCM 9.0), the format of how the Main Menu expands has changed, but the actual navigation path and functionality has **not** changed. See the sample page shot.

Other minor changes include the following:

- Improved color scheme
- New look for Processing and Save indicators
- Pop-up Search Window and Edit Boxes
- Number of Search Results Option
- Type Ahead Matching

Update a Vacant Position

Navigate to Add/Update Position Info Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
The Add/Update Position Info search page displays.

1. Enter the appropriate criteria for the position you wish to update
2. Hit the **Search** button
3. We recommend checking the **Include History** box in order to see all history of the position when making your update

Position Data is only effective dated, not effective sequenced, and there may be times when you need to update the most current row of data based on a change effective the same day. In this case, you should check the **Correct History** box so you can CORRECT the row of data as appropriate. *This should only be done if the effective date of the change is the same as the most current row of data.*

The Description page displays.

4. Push the **Add a Row (+)** button to insert a new effective dated row
A new row is inserted with an effective date of the current system date.

Action to be taken

**Effective Date:** Update the effective date to the appropriate effective date for this position update.

**Status:** If you are changing the status of the position, update as appropriate.

**Reason:** Enter the Reason for the update – use the lookup button to see valid Reasons.

The Look Up Reason page displays.

5. Click the hyperlink of the appropriate Reason to select it

*Note:* You may also type the 3-character Reason code into the field without using the lookup button.

**Reason Codes**

**CCV:** Used when the entire classification is converted, typically not used for individual positions. When a classification is converted by the CSU, the baseline team should provide a process to update positions behind the scenes.

**ETR:** Used to end a temporary reclassification of a position.

**ICP:** Used to elevate the range of a position. In-Class Progression is a salary update and would indicate a change in salary for the incumbent.

**INA:** Used to inactivate a position.

**JRC:** Used for a standard job reclassification (up or down)

**NEW:** Used for creation of a new position only. This would not be used in an update situation.

**REA:** Used to reactivate a position that was previously inactivated.

**REO:** Used when processing a departmental reorganization. Typically, this change will include a change in reporting and/or departmental structure.

**TJR:** Used to temporarily reclassify a position.
TTL: Used when the only item being updated is the position title.

UPD: Used to update any position element not covered in the other reasons. You may use this to change reporting or department information outside of reorganization. It may also be used to update funding information or an MPP Job Code.

The Description page is returned with the Reason field updated.

In this example, we have used Job Reclassification as the reason as we are downgrading the position from AA/S Exempt II to AA/S NonExempt.

6. Once the Reason is populated, update the appropriate fields to reflect the change in information.

Note the changes made:

- Title
- Short Title

Additional values that may be updated include:

- Job Code
- Reg/Temp and Full/Part-Time

Additional changes made to the fields at the bottom of the page:

- Grade
- FLSA Status

Additional values that may be updated include:

- Change in Department
- Change in Reporting structure (Reports To and Dot-Line)
Navigate to the Specific Information page

7. Open the Education and Government section to view all data on this page

Update the appropriate values based on the position changes you are making. This may include:

- Increase or Decrease in Max Head Count
- Change to Budgeted Position status
- Change to Funding by Change to Position Pool ID
- Increase or Decrease in FTE

**Incumbents**

The Incumbents section does not need to be updated when the position is vacant. Leaving the Update Incumbents box checked will have no impact.

Navigate to the Budget and Incumbents page

*Note: For vacant positions, you may skip this page as no incumbent data will be present.*
Navigate to the CSU Position Data page

8. Once all appropriate data has been entered, be sure to hit the Save button

Update the appropriate values based on the position changes you are making. This may include:

- Change in Unit
- Change in Primary Fund
- Change in MPP Job Code information
Update a Filled Position – Example 1
This example demonstrates updating a filled position with a future dated effective date row insert.

Navigate to Add/ Update Position Info Organizational Development > Position Management > Maintain Positions/ Budgets > Add/Update Position Info

The Add/Update Position Info search page displays.

1. Enter the appropriate criteria for the position you wish to update and hit the Search button

Note: We recommend checking the Include History box in order to see all history of the position when making your update.

Position Data is only effective dated, not effective sequenced, and there may be times when you need to update the most current row of data based on a change effective the same day. In this case, you should check the Correct History box so you can CORRECT the row of data as appropriate. This should only be done if the effective date of the change is the same as the most current row of data.

When updating a position that is filled, if you CORRECT data, you may not be able to update its incumbents automatically and will have to insert a new effective dated row in Job. If the correction row is future dated, the job data will update. However, if it is current or prior to the current date, a manual job update will be required.
The Description page displays.

Navigate to the Budget and Incumbents page to view the incumbent information.

The Budget and Incumbents page is displayed.

If there were multiple incumbents in this position, all data would be listed.

2. Click the Job Data hyperlink to view the Job Data of the incumbent.

The Work Location page displays.

3. Note that the incumbent was hired into the position on 11-6-2006.
4. Scroll to the bottom of the page and click OK to return to the position data.

Note: You may view all pages of job data at this point if needed. The OK button will appear at the bottom of each job page, returning you to position data when pushed.

You are returned to the Budget and Incumbents page.

Navigate back to the Description page to make the position updates.

The Description page is displayed.

5. Push the Add a New Row (+) button to insert a new effective dated row.
A new row is inserted with the effective date defaulting to the current system date.

Action to be taken

Effective Date: Update the effective date to the appropriate effective date for this position update.
Status: If you are changing the status of the position, update as appropriate. **It is not recommended to inactivate a position that is filled. You should move the incumbent to a new position first, then make the position update.**
Reason: Enter the Reason for the update – use the lookup button to see valid Reasons.

The Look Up Reason page displays.

6. Click the hyperlink of the appropriate Reason to select it

Note: You may also type the 3-character Reason code into the field without using the lookup button.

Reason Codes

CCV: Used when the entire classification is converted, typically not used for individual positions. When a classification is converted by the CSU, the baseline team should provide a process to update positions behind the scenes.
ETR: Used to end a temporary reclassification of a position.
ICP: Used to elevate the range of a position. In-Class Progression is a salary update and would indicate a change in salary for the incumbent.
INA: Used to inactivate a position.
JRC: Used for a standard job reclassification (up or down)
NEW: Used for creation of a new position only. This would not be used in an update situation.
REA: Used to reactivate a position that was previously inactivated.
REO: Used when processing a departmental reorganization. Typically, this change will include a change in reporting and/or departmental structure.
TJR: Used to temporarily reclassify a position.
TTL: Used when the only item being updated is the position title.
UPD: Used to update any position element not covered in the other reasons. You may use this to change reporting or department information outside of reorganization. It may also be used to update funding information or an MPP Job Code.

The Description page is returned with the Reason field updated.

In this example, we have used Position Data Update as we are changing the position’s reporting structure, but it is not part of a reorganization.

Once the Reason is populated, update the appropriate fields to reflect the change in information. Values that may be updated include:

- Job Code
- Reg/Temp and Full/Part-Time
- Title and Short Title

Changes made to the fields at the bottom of the page:

- Department

When a department is changed, the message above will be received – letting you know that the Position Pool ID must be updated when this type of change is made. This change will be made (if appropriate) on the Specific Information page.
Administrative Applications Position Management/Maintain Position Data

Additional changes made to the fields at the bottom of the page:

- Location (default from change in Department)
- Reports To

Additional values that may be updated include:

- Change in Grade
- Change in FLSA Status

Navigate to the Specific Information page

7. Open the Education and Government section to view all data on this page.

Update the appropriate values based on the position changes you are making. This may include:

- Increase or Decrease in Max Head Count
- Change to Budgeted Position status
- Change to Funding by Change to Position Pool ID – remember, when the department is changed, this value will be wiped out and must be re-keyed if funding at the position pool level
- Increase or Decrease in FTE
Incumbents

It is CRITICAL to keep the Update Incumbents check box ON in order to update information on the incumbent's job row.

If your changes have included a change to the salary plan or grade, you will also want to check the Include Salary Plan/Grade check box in the incumbents section. If you did not make these changes, it can remain OFF.

Navigate to the CSU Position Data page

8. Once all appropriate data has been entered, be sure to hit the Save button

Update the appropriate values based on the position changes you are making. This may include:

- Change in Unit
- Change in Primary Fund
- Change in MPP Job Code information
Once saved, navigate back to the Budget and Incumbents page.

9. Click the Job Data hyperlink to look at the incumbent’s job data once more.

The Work Location page displays – showing you the new effective dated job row based on your position change.

10. Note the changes that you made to ensure they came across in the update.

Navigate to the Job Information page.

The Job Information page displays.

11. Note the changes made here as well.
This is the prior row of Job Information for comparison.

Navigate to the CSU Job page

The CSU Job page displays – make sure you are on Row 1 (the new row).

12. Depending on the changes made, a PPT may or may not need to be generated. Set the PPT Status appropriately

Note: In our example, no PPT is required, and no other data requires updating.

Navigate to the Compensation page if compensation requires changing

Additional values that may require updating here are:

- Probation Code/Prob End
- Anniversary Code/Ann Month/Year

The Compensation page displays.

13. Update the Comp Rate if appropriate. If there is no change in the compensation based on the position changes, this page can be skipped.
14. Scroll down on any page once all data is updated and click OK to return to the position data

Communication between those who update positions and those who update job data is critical in order to ensure the updates are in synch and timely.
Update a Filled Position – Example 2
This example shows an update to a position that changes multiple pieces of data, including salary plan & grade.

The Description Page page displays.

A new JRC row was inserted with the effective date of 1-1-2007.

Changes include:

- Job Code
- Title
- Short Title (default from Job Code)

Additional changes made at the bottom of the page include:

- Department
- Location (default from Department)
- Reports To
- Salary Admin Plan & Grade (default from Job Code)

Incumbents

Both the Update Incumbents and Include Salary Plan/Grade boxes are checked. This is done to ensure that the changes made on the Description page are all moved to the Job. In order to keep position and job data in synch, it is critical to update as much data as possible automatically.
On the CSU Position Data page, the Unit, Primary Fund and MPP Job Code were updated.

Upon save, you will receive a message related to the update of the incumbent’s data. This is related to the salary plan & grade update.

1. Click OK

Navigate to the incumbent’s job data from the Budget and Incumbents page of position data

The Work Location page displays and shows your changes.

The Job Information page shows additional changes.
The Payroll page may require additional changes.

Note: If the bargaining unit and/or FLSA status has changed, the Absence Pay Group must be updated. This does NOT happen automatically from a position update.

The update page might look something like this.

In our example, the incumbent moved from CSUEU Exempt to M80.

The Salary Plan pages will identify the changes in the Sal Admin Plan & Grade.
The CSU Job page shows the changes that were made, and will also require additional changes.

Additional values that may be changed include:

- PPT Status – must be changed to either No PPT or Pay Ready. If a PPT is required, Pay Ready is the appropriate choice.
- Probation Code/Prob End
- Anniversary Code/Ann Month/Year

The updated page might look something like this.

The Compensation page should be used to update compensation based on the position changes.

2. Override the Comp Rate and push the Calculate Compensation button
The updated page might look something like this.

Note: When changes are made to the position that change the incumbent’s bargaining unit, or hourly/salaried status, the **Time Reporter Data** (accessed from the Employment Information page) must be updated.

The Time and Labor Data displays the current information for the incumbent.

3. Insert a new row by clicking the add a new row (+) button
The new row appears and the following data should be updated:

- Effective Date
- Workgroup

4. Scroll to the bottom of any page and click OK to be returned to the position data
Update a Filled Position – Example 3
This example shows an update to a position that uses correction made on a future dated row.

On the Add/Update Position Info search page
1. Check the Correct History box

The Description page displays.

This example assumes our changes are on the 1-1-2007 effective dated row.

Note the change that was made:

- Title

Note: At this time, changes to any other value could be made as well.
Note the original information at the bottom of the page.

And the changes...

When you navigate to the Specific Information page, it will look like it did when the original 1-1-2007 row was inserted.

2. Check **Update Incumbents and Include Salary Plan/Grade** boxes
If necessary, navigate to the CSU Position Data for changes.

3. Note the original data

And the changes…

Upon save, the message to validate salary information on the job will be displayed.

4. Click OK

Navigate to the incumbent’s job data via the Budget and Incumbents page to view the changes

On the Work Location page, the Title is updated.
On the Job Information page, the Reports to information is updated.

On the CSU Job page, the Unit and Primary Fund information are updated.

5. You may be required to change additional information here depending on what the updates were that you made.

6. Scroll to the bottom of any job page and click OK to return to the position data.
Update a Filled Position – Example 4

This example shows an update to a position that uses correction made on a current row, with a date prior to the current system date.

The Description page displays.

This example assumes our changes are on the 1-1-2005 effective dated row.

1. Scroll to the bottom to view the existing data

2. Note the changes made
The Specific Information page will display in the same state it was in when the 1-1-2005 row was created initially.

3. You may check the Update Incumbents boxes, but in this case, no job data will be updated since this row is in the past.

If you chose to check the update incumbents box, the page might look something like this.

The CSU Position Data page will display in its original state as well.
4. Once all updates are made, be sure to save.

Navigate to the incumbent's job data via the Budget and Incumbents page.

The most current row in Job Data is 5-10-2005, and you will notice that NONE of the changes have occurred. In this case, a new effective dated row of job data would need to be inserted to reflect the position changes.

General Guidelines when Updating Position and Incumbent Data

1. Insert new effective dated rows at the position level if at all possible.
2. If job data exists with a future dated row greater than that inserted at the position level, manual updates to job data will be required.
3. Job data will be updated automatically when a new effective dated row is inserted on the position and the Update Incumbents box is checked.
4. Job data will be updated automatically when a future dated row is corrected on the position and the Update Incumbents box is checked.
5. Any time there is a change on the position to Salary Plan and/or Grade; make sure to check the Include Salary Plan/Grade box in the Update Incumbents area.
6. There will ALWAYS be a required update to job data with regard to the PPT. Many other manual changes may be required as well, depending on the changes in the position.
Whom to Contact for Help?
For additional help or to report problems with this functionality, please log a ticket via the Service Desk (http://www.csueastbay.edu/servicedesk).