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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.

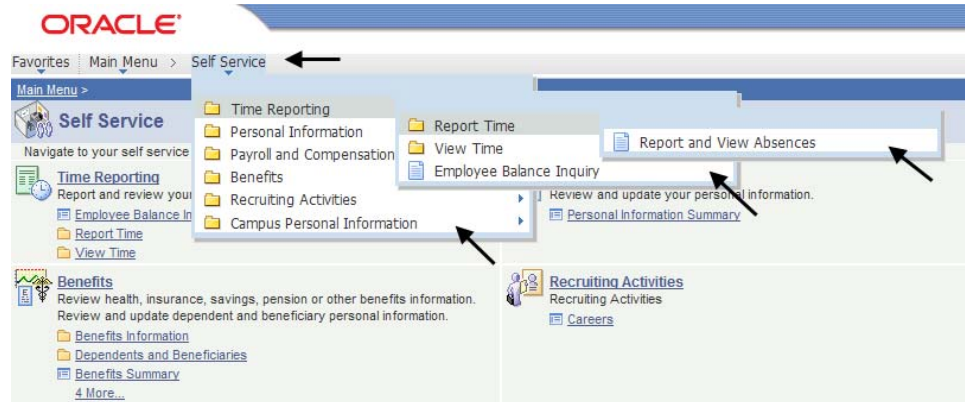
Notice about the new version of PeopleSoft

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.

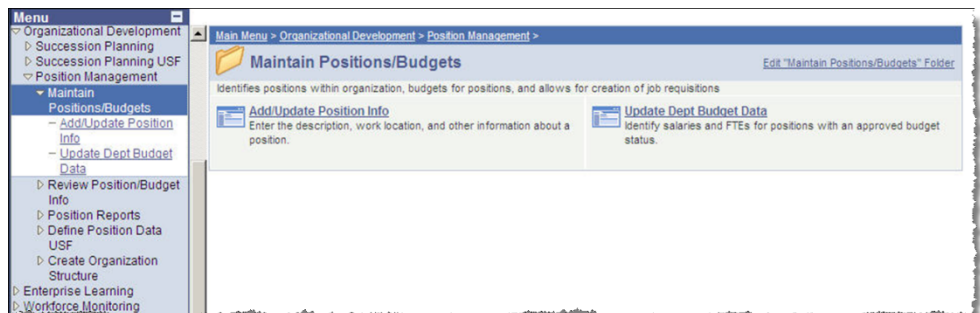
Other minor changes include the following:

- 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

Add/Update Position Info
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Position Number:

Description:

Position Status:

Business Unit:

Department:

Job Code:

Reports To Position Number:

☐ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Add/Update Position Info
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Position Number:

Description:

Position Status:

Business Unit:

Department:

Job Code:

Reports To Position Number:

☒ Include History ☐ Correct History ☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

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

Description | [Specific Information](#) | [Budget and Incumbents](#) | [CSU Position Data](#)

Position Information Find | View All First 1 of 1 Last

Position Number: 00009812 → + -

Headcount Status: Open Current Head Count: 0 out of 1

*Effective Date: 11/01/2006 *Status: Active

Reason: NEW New Position Action Date: 11/05/2006

*Position Status: Approved Status Date: 11/01/2006 ☐ Key Position

Job Information

*Business Unit: HAY Cal State East Bay

Job Code: 1038 Admin Analyst/Spclst 12 Mo Manager Level: Non-Manager

*Reg/Temp: Regular *Full/Part Time: Full-Time

*Regular Shift: N/A Union Code: R09 Cal St Univ EE Union - Tech

Title: Software Analyst/Trainer Short Title: AA/S E II [Detailed Position Description](#)

Work Location

*Reg Region: USA United States

A new row is inserted with an effective date of the current system date.

The screenshot shows a web-based form for 'CSU Position Data'. It has tabs for 'Description', 'Specific Information', 'Budget and Incumbents', and 'CSU Position Data'. The 'Position Information' section includes fields for Position Number (00009812), Headcount Status (Open), Current Head Count (0 out of 1), Effective Date (11/12/2006), Status (Active), Reason (empty), Action Date (11/12/2006), Position Status (Approved), Status Date (11/01/2006), and a checkbox for Key Position. The 'Job Information' section includes Business Unit (HAY - Cal State East Bay), Job Code (1038 - Admin Analyst/Spclst 12 Mo), Manager Level (Non-Manager), Reg/Temp (Regular), Full/Part Time (Full-Time), Regular Shift (N/A), Union Code (R09 - Cal St Univ EE Union - Tech), Title (Software Analyst/Trainer), Short Title (AAS E II), and a link for Detailed Position Description. The 'Work Location' section includes Reg Region (USA - United States).

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.

- 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.

The screenshot shows the 'Look Up Reason' page. It has fields for Action (POS), Reason Code (begins with), and Description (begins with). There are buttons for Look Up, Clear, Cancel, and a link for Basic Lookup. Below is a 'Search Results' table with 11 rows of Reason Codes and their descriptions.

Reason Code	Description
CCV	Classification Conversion
ETR	End Temp Job Reclassification
ICP	In-Class Progress/Range Elev
INA	Position Inactivated
JRC	Job Reclassification
NEW	New Position
REA	Position Reactivated
REQ	Reorganization
TJR	Temporary Job Reclassification
TTL	Title Change
UPD	Position Data Update

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.

REQ: 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.

- 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)

Description | Specific Information | Budget and Incumbents | CSU Position Data

Find | View All | First 1 of 2 Last

Position Information

Position Number: 00009812
 Headcount Status: Open
 Current Head Count: 0 out of 1
 *Effective Date: 12/01/2006
 *Status: Active
 Reason: JRC Job Reclassification
 Action Date: 11/12/2006
 *Position Status: Approved
 Status Date: 11/01/2006
☐ Key Position

Job Information

*Business Unit: HAY Cal State East Bay
 Job Code: 1038 Admin Analyst/Spclst 12 Mo
 Manager Level: Non-Manager
 *Reg/Temp: Regular
 *Full/Part Time: Full-Time
 *Regular Shift: N/A
 Union Code: R09 Cal St Univ EE Union - Tech
 Title: Software Analyst/Trainer
 Short Title: AA/S E II [Detailed Position Description](#)

Work Location

*Reg Region: USA United States

Description | Specific Information | Budget and Incumbents | CSU Position Data

Find | View All | First 1 of 2 Last

Position Information

Position Number: 00009812
 Headcount Status: Open
 Current Head Count: 0 out of 1
 *Effective Date: 12/01/2006
 *Status: Active
 Reason: JRC Job Reclassification
 Action Date: 11/12/2006
 *Position Status: Approved
 Status Date: 11/01/2006
☐ Key Position

Job Information

*Business Unit: HAY Cal State East Bay
 Job Code: 1038 Admin Analyst/Spclst 12 Mo
 Manager Level: Non-Manager
 *Reg/Temp: Regular
 *Full/Part Time: Full-Time
 *Regular Shift: N/A
 Union Code: R09 Cal St Univ EE Union - Tech
 Title: Software Analyst/Trainer Tmee
 Short Title: AA/S NE [Detailed Position Description](#)

Work Location

*Reg Region: USA United States

Work Location

*Reg Region: USA United States
 Department: 1207 CMS Project Office
 Company: HAY Cal State East Bay
 Location: 0042 Acctg & Admin Systems
 Reports To: 00004921 Mgr, Training & Support/HR PM
 Dot-Line: 00005748 Senior Manager, CMS Project
 Supervisor Lvl:

Salary Plan Information

Salary Admin Plan: 929 Grade: 1 Step:
 Standard Hours: 40.00 Work Period: W Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

USA
 FLSA Status: Nonexempt Bargaining Unit: 8888

Save | Return to Search | Notify | Previous tab | Next tab | Add | Update/Display | Include History | Correct History

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [CSU Position Data](#)

Navigate to the Specific Information page

- 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

The screenshot shows a web application interface with a tabbed menu at the top: "Description", "Specific Information", "Budget and Incumbents", and "CSU Position Data". The "CSU Position Data" tab is active. Below the tabs, the following information is displayed:

Position Number: 00009812
Headcount Status: Open
Current Head Count: 0 out of 1

The "CSU Position Data" section contains the following fields:

- Effective Date: 12/01/2006
- Unit: 042 (with a search icon) - Acct/Systems and Technology
- Primary Fund: GFND (with a search icon) - General Fund
- MPP Job Family Code: (with a search icon)
- MPP Job Function: (with a search icon)
- MPP Reporting Category: (with a search icon)

At the bottom of the form, there is a row of buttons: Save, Return to Search, Notify, Previous tab, Next tab, Add, Update/Display, Include History, and Correct History. Below the buttons, there is a breadcrumb trail: [Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [CSU Position Data](#).

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

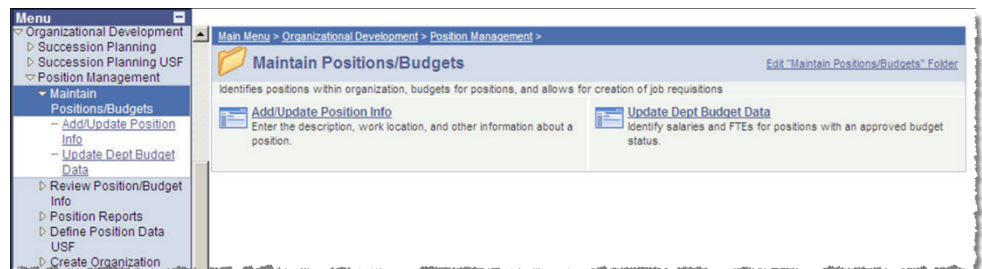
This example demonstrates updating a filled position with a future dated effective date row insert.

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.*



Add/Update Position Info
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Position Number:

Description:

Position Status:

Business Unit:

Department:

Job Code:

Reports To Position Number:

☐ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Add/Update Position Info
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Position Number:

Description:

Position Status:

Business Unit:

Department:

Job Code:

Reports To Position Number:

☒ Include History ☐ Correct History ☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

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

Description | Specific Information | Budget and Incumbents | CSU Position Data

Position Information Find | View All First 1 of 1 Last

Position Number: 00009812
Headcount Status: Filled Current Head Count: 1 out of 1
*Effective Date: 11/01/2006 *Status: Active
Reason: NEW New Position Action Date: 11/05/2006
*Position Status: Approved Status Date: 11/01/2006 ☐ Key Position

Job Information

*Business Unit: HAY Cal State East Bay
Job Code: 1038 Admin Analyst/Spclst 12 Mo Manager Level: Non-Manager
*Reg/Temp: Regular *Full/Part Time: Full-Time
*Regular Shift: N/A Union Code: R09 Cal St Univ EE Union - Tech
Title: Software Analyst/Trainer Short Title: AA/S E II [Detailed Position Description](#)

Work Location

*Reg Region: USA United States

Description | Specific Information | Budget and Incumbents | CSU Position Data

Position Number: 00009812
Headcount Status: Filled Current Head Count: 1 out of 1

Current Budget

Earnings	Deductions	Tax	Cdn Tax	Total
0.000	0.000	0.000	0.000	0.00

Current Incumbents Customize Find First 1 of 1 Last

EmplID	Empl Rcd#	Full/Part	Std Hrs/Wk	Name	Job Data
005387116	0	Full-Time	40.00	Seal, Lou	Job Data

Save Return to Search Previous in List Next in List Notify Previous tab Next tab Add Update/Display Print

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [CSU Position Data](#)

Work Location | Job Information | Job Labor | Payroll | Salary Plan | CSU Job | Compensation | CSU Faculty Job

Seal, Lou EMP ID: 005387116 Empl Rcd #: 0

Work Location Find | View All First 1 of 1 Last

HR Status: Active Payroll Status: Active
*Effective Date: 11/06/2006 Sequence: 0 *Job Indicator: Primary Job
Action / Reason: Hire Appointment

Last Start Date: 11/06/2006 Termination Date:
Expected Job End Date
Position Number: 00009812 Software Analyst/Trainer Position Entry Date: 11/06/2006
☐ Position Management Record

Regulatory Region: USA United States
Company: HAY Cal State East Bay
Business Unit: HAY Cal State East Bay
Department: 1207 CMS Project Office Department Entry Date: 11/06/2006
Location: 0042 Acctg & Admin Systems
Establishment ID: HAY Cal State East Bay

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 need be. The OK button will appear at the bottom of each job page, returning you to position data when pushed.

Current

Last Start Date: 11/06/2006 Termination Date:

Expected Job End Date

Position Number: 00009812 Software Analyst/Trainer Position Entry Date: 11/06/2006

[Override Position Data](#) ☐ Position Management Record

Regulatory Region: USA United States

Company: HAY Cal State East Bay

Business Unit: HAY Cal State East Bay

Department: 1207 CMS Project Office Department Entry Date: 11/06/2006

Location: 0042 Acctg & Admin Systems

Establishment ID: HAY Cal State East Bay

Date Created: 11/12/2006

Job Data [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

OK Cancel Apply [Previous tab](#) [Next tab](#) Refresh

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [CSU Job](#) | [Compensation](#) | [CSU Faculty Job](#)

You are returned to the Budget and Incumbents page.

Navigate back to the Description page to make the position updates

Description [Specific Information](#) [Budget and Incumbents](#) [CSU Position Data](#)

Position Number: 00009812

Headcount Status: Current Head Count: 1 out of 1

Earnings	Deductions	Tax	Cdn Tax	Total
0.000	0.000	0.000	0.000	0.00

Current Incumbents [Customize](#) [Find](#) First 1 of 1 Last

EmplID	Empl Rcd#	Full/Part	Std Hrs/Wk	Name	Job Data
005387116	0	Full-Time	40.00	Seal,Lou	Job Data

Save [Return to Search](#) [Previous in List](#) [Next in List](#) Notify [Previous tab](#) [Next tab](#) Add Update/Display

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [CSU Position Data](#)

The Description page is displayed.

5. Push the **Add a New Row (+)** button to insert a new effective dated row

Description [Specific Information](#) [Budget and Incumbents](#) [CSU Position Data](#)

Position Information [Find](#) [View All](#) First 1 of 1 Last

Position Number: 00009812

Headcount Status: Current Head Count: 1 out of 1

*Effective Date: 11/01/2006 *Status: Active

Reason: NEW New Position Action Date: 11/05/2006

*Position Status: Approved Status Date: 11/01/2006 ☐ Key Position

[Job Information](#)

*Business Unit: HAY Cal State East Bay

Job Code: 1038 Admin Analyst/Spclst 12 Mo Manager Level: Non-Manager

*Reg/Temp: Regular *Full/Part Time: Full-Time

*Regular Shift: N/A Union Code: R09 Cal St Univ EE Union - Tech

Title: Software Analyst/Trainer Short Title: AA/S E II [Detailed Position Description](#)

[Work Location](#)

*Reg Region: USA United States

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.

- 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 Code	Description
CCV	Classification Conversion
ETR	End Temp Job Reclassification
ICP	In-Class Progress/Range Elev
INA	Position Inactivated
JRC	Job Reclassification
NEW	New Position
REA	Position Reactivated
REQ	Reorganization
TJR	Temporary Job Reclassification
TTL	Title Change
UPD	Position Data Update

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.

REQ: 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.

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

The updated page might look something like this.

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

Budget and Incumbents

Position Number: 00009812
 Headcount Status: Filled
 Current Head Count: 1 out of 1

Earnings	Deductions	Tax	Cdn Tax	Total
0.000	0.000	0.000	0.000	0.00

Current Incumbents

EmplID	Empl Rcd#	Full/Part	Std Hrs/Wk	Name	Job Data
005387116	0	Full-Time	40.00	Seal,Lou	Job Data

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Previous tab, Next tab, Add, Update/Display

Work Location

Seal,Lou EMP ID: 005387116 Empl Rcd #: 0

HR Status: Active Payroll Status: Active
 *Effective Date: 12/01/2006 Sequence: 0 *Job Indicator: Primary Job
 Action / Reason: Position Change Position Data Update

Last Start Date: 11/06/2006 Termination Date: Future
 Expected Job End Date:
 Position Number: 00009812 Software Analyst/Trainer Position Entry Date: 11/06/2006
 ☒ Position Management Record

Regulatory Region: USA United States
 Company: HAY Cal State East Bay
 Business Unit: HAY Cal State East Bay
 Department: 1042 Admin Systems & Finance Department Entry Date: 12/01/2006
 Location: 0008 Fin & Adm Prog Plan
 Establishment ID: HAY Cal State East Bay

Job Information

Seal,Lou EMP ID: 005387116 Empl Rcd #: 0

Effective Date: 12/01/2006 Effective Sequence: 0 Job Indicator: Primary Job
 Action / Reason: Posn Chg Position Data Update

Job Code: 1038 Admin Analyst/Splst 12 Mo Entry Date: 11/06/2006
 Supervisor Level:
 Supervisor ID:
 Reports To: 00000018 AVP, Admin Syst & Fin 000013196 Bibb,Shawn
 Regular/Temporary: Regular Full/Part: Full-Time
 Empl Class: Regular *Officer Code: None
 Regular Shift: N/A Shift Rate: /
 Classified Ind: All

Standard Hours
 Standard Hours: 40.00

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

Work Location | Job Information | Job Labor | Payroll | Salary Plan | CSU Job | Compensation | CSU Faculty Job

Seal, Lou EMP ID: 005387116 Empl Rcd #: 0

Job Information Find | View All First 2 of 2 Last

Effective Date: 11/06/2006 Effective Sequence: 0 Job Indicator: Primary Job
 Action / Reason: Hire Appointment Current

Job Code: 1038 Admin Analyst/Spclst 12 Mo Entry Date: 11/06/2006
 Supervisor Level:
 Supervisor ID:
 Reports To: 00004921 Mgr, Training & Support/HR PM 000012455 Medders, Carrie M
 Regular/Temporary: Regular Full/Part: Full-Time
 Empl Class: Regular *Officer Code: None
 Regular Shift: N/A Shift Rate:
 Classified Indc: All

Standard Hours
 Standard Hour: 40.00

Work Location | Job Information | Job Labor | Payroll | Salary Plan | CSU Job | Compensation | CSU Faculty Job

Seal, Lou EMP ID: 005387116 Empl Rcd #: 0

CSU Job Find | View All First 1 of 2 Last

Effective Date: 12/01/2006 Effective Sequence: 0 Job Indicator: Primary Job
 Action / Reason: Posn Chg Position Data Update Future

*PPT Status: Await Act Run Date:
 *Probation Code: On Prob No Status Other Class Prob End: 10/31/2007
 *Anniversary Code: Eligible Anni Month / Year: 11 / 2007
 Retirement Code: 08 PERS-SS/MED Pay End Date:
 Legal Reference: Red Circle Date:
 AY Dur of Appt: Empl History Remarks:
 Unit: 042 Acct/S&T
 Primary Fund: GFND General Fund
 PPT Processing
 Comments:

Job Data Employment Data Earnings Distribution Benefits Program Participation

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

Work Location | Job Information | Job Labor | Payroll | Salary Plan | CSU Job | Compensation

Seal, Lou EMP ID: 005387116 Empl Rcd #: 0

Compensation Find | View All First 1 of 2 Last

Effective Date: 12/01/2006 Effective Sequence: 0 Job Indicator: Primary Job
 Action / Reason: Posn Chg Position Data Update Future

Compensation Rate: 5,100.000000 *Frequency: M Monthly

Comparative Information
 Pay Rates
 Default Pay Components

Pay Components Customize | Find First 1 of 1 Last

Amounts	Controls	Changes	Conversion			
*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	
1 CSUMTH	0	5,100.000000	USD	M		

Calculate Compensation

Job Data Employment Data Earnings Distribution Benefits Program Participation

14. Scroll down on any page once all data is updated and click OK to return to the position data

The screenshot shows a web-based form titled "CSU Job" with a navigation bar at the top containing "Find", "View All", "First", "1 of 2", and "Last". The form is divided into several sections. The top section contains "Effective Date: 12/01/2006", "Effective Sequence: 0", and "Job Indicator: Primary Job". Below this is "Action / Reason: Posn Chg" and "Position Data Update" with a "Future" link. The main data entry area includes fields for "PPT Status" (No PPT), "Probation Code" (On Prob No Status Other Class), "Anniversary Code" (Eligible), "Retirement Code" (08), "Legal Reference", "AY Dur of Appt", "Unit" (042), "Primary Fund" (GFND), and "PPT Processing". To the right of these fields are "Run Date", "Prob End" (10/31/2007), "Anni Month / Year" (11 / 2007), "Pay End Date", "Red Circle Date", and "Empl History Remarks". A "Comments" text area is at the bottom left. Below the form is a tabbed interface with "Job Data" selected, and other tabs for "Employment Data", "Earnings Distribution", and "Benefits Program Participation". At the bottom are buttons for "OK", "Cancel", "Apply", "Previous tab", "Next tab", and "Refresh". A breadcrumb trail at the very bottom reads "SU Job | CSU Faculty Job | Employment Information".

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 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)

Position Information

Position Number: 00009812

Headcount Status: Current Head Count: 1 out of 1

*Effective Date: 01/01/2007

*Status: Active

Reason: JRC Job Reclassification

Action Date: 11/12/2006

*Position Status: Approved

Status Date: 11/01/2006

☐ Key Position

Job Information

*Business Unit: HAY Cal State East Bay

Job Code: 3312 Administrator II

Manager Level: Non-Manager

*Reg/Temp: Regular

*Full/Part Time: Full-Time

*Regular Shift: N/A

Union Code: M80 Management Personnel Plan

Title: Mgr. Communication

Short Title: ADMIN 2

Work Location

*Reg Region: USA United States

Work Location

*Reg Region: USA United States

Department: 1207 CMS Project Office

Company: HAY Cal State East Bay

Location: 0042 Acctg & Admin Systems

Reports To: 00004921 Mgr. Training & Support/HR PM

Dot-Line: 00005748 Senior Manager, CMS Project

Supervisor Lvl:

Salary Plan Information

Salary Admin Plan: M07

Grade: 1

Step:

Standard Hours: 40.00

Work Period: Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

FLSA Status: Exempt

Bargaining Unit: 8888

Save Return to Search Previous in List Next in List Notify Previous tab Next tab Add Update/Display

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.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | CSU Job | Compensation | CSU Faculty Job

Seal, Lou EMP ID: 005387116 Empl Rcd #: 0

Payroll Information Find | View All First 1 of 3 Last

Effective Date: 01/01/2007 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Posn Chg Job Reclassification Future

Payroll System: Payroll for North America Absence System: Absence Management

Payroll for North America

Pay Group: MST Master Payroll Holiday Schedule: HOL Holiday Sc

Employee Type: S Salaried FICA Status: Subject

Tax Location Code: HAY HAY

GL Pay Type:

Combination Code: [Edit ChartFields](#)

Absence Management System

Pay Group: CSUEU SALX CSUEU Salaried Exempt

Use Pay Group Value

Eligibility Group: ☒

Exchange Rate Type: ☒

Work Location | Job Information | Job Labor | Payroll | Salary Plan | CSU Job | Compensation | CSU Faculty Job

Seal, Lou EMP ID: 005387116 Empl Rcd #: 0

Payroll Information Find | View All First 1 of 3 Last

Effective Date: 01/01/2007 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Posn Chg Job Reclassification Future

Payroll System: Payroll for North America Absence System: Absence Management

Payroll for North America

Pay Group: MST Master Payroll Holiday Schedule: HOL Holiday Sc

Employee Type: S Salaried FICA Status: Subject

Tax Location Code: HAY HAY

GL Pay Type:

Combination Code: [Edit ChartFields](#)

Absence Management System

Pay Group: M80 VAC M80 Vacation

Use Pay Group Value

Eligibility Group: ☒

Exchange Rate Type: ☒

Work Location | Job Information | Job Labor | Payroll | Salary Plan | CSU Job | Compensation | CSU Faculty Job

Seal, Lou EMP ID: 005387116 Empl Rcd #: 0

Salary Plan Find | View All First 1 of 3 Last

Effective Date: 01/01/2007 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Posn Chg Job Reclassification Future

Salary Administration Plan: M07 Grade: 1 Grade Entry Date: 01/01/2007

Includes Wage Progression Rule ☐ Step: Step Entry Date:

[Job Data](#) [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

[OK](#) [Cancel](#) [Apply](#) [Previous tab](#) [Next tab](#) [Refresh](#)

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [CSU Job](#) | [Compensation](#) | [CSU Faculty Job](#)

The CSU Job page shows the changes that were made, and will also require additional changes.

The screenshot shows the 'CSU Job' page for user Seal.Lou, EMP, ID: 005387116, Empl Rcd #: 0. The page is divided into tabs: Work Location, Job Information, Job Labor, Payroll, Salary Plan, CSU Job (selected), Compensation, and CSU Faculty Job. The 'CSU Job' tab contains the following fields:

- Effective Date: 01/01/2007
- Effective Sequence: 0
- Job Indicator: Primary Job
- Action / Reason: Posn Chg
- Job Reclassification: Future
- *PPT Status: Await Act
- *Probation Code: On Prob No Status Other Class
- *Anniversary Code: Eligible
- Retirement Code: 08
- Legal Reference:
- AY Dur of Appt:
- Unit: 006
- Primary Fund: TRST
- PPT Processing Comments:
- Run Date: 01/01/2007
- Prob End: 10/31/2007
- Anni Month / Year: 11 / 2007
- Pay End Date:
- Red Circle Date:
- Empl History Remarks:

At the bottom, there are links for Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation.

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.

This screenshot shows the 'CSU Job' page after updates. The changes are:

- *PPT Status: Pay Ready
- *Probation Code: None
- *Anniversary Code: Eligible
- Anni Month / Year: 01 / 2008

All other fields remain the same as in the previous screenshot.

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 screenshot shows the 'Compensation' page for user Seal.Lou, EMP, ID: 005387116, Empl Rcd #: 0. The page is divided into tabs: Work Location, Job Information, Job Labor, Payroll, Salary Plan, CSU Job, Compensation (selected), and CSU Faculty Job. The 'Compensation' tab contains the following fields:

- Effective Date: 01/01/2007
- Effective Sequence: 0
- Job Indicator: Primary Job
- Action / Reason: Posn Chg
- Job Reclassification: Future
- Compensation Rate: 5,100.000000
- *Frequency: M Monthly
- Comparative Information
- Pay Rates
- Default Pay Components
- Pay Components
- Amounts
- Controls
- Changes
- Conversion
- Calculate Compensation

The 'Pay Components' table is visible, showing a single row with the following data:

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 CSUMTH	0	5,100.000000	USD	M	

At the bottom, there are links for Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation.

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

Time and Labor Data

Seal,Lou ID: 005387116 Empl Rcd #: 0

Time Reporter Data Find | View All First 1 of 2 Last

*Effective Date: 01/01/2007 *Time Reporter Status: Active ☒ Send Time to Payroll

Time Reporter Type: Elapsed Time Reporting Template: SJ ELAPSED ☒ Commitment Accounting Flags

☒ For Taskgroup ☒ For Department

Time Period ID: CSUMONTH CSU Monthly Time Period

*Workgroup: SAL ADMIN Salaried ADMIN

*Taskgroup: CSU CSU Generic

Task Profile ID:

TCD Group:

Restriction Profile ID:

Rule Element 1:

Rule Element 2:

Rule Element 3:

Description | Specific Information | Budget and Incumbents | CSU Position Data

Position Number: 00009812

Headcount Status: Current Head Count: 1 out of 1

Current Budget

Earnings	Deductions	Tax	Cdn Tax	Total
0.000	0.000	0.000	0.000	0.00

Current Incumbents Customize | Find | First 1 of 1 Last

EmplID	Empl Rcd#	Full/Part	Std Hrs/Wk	Name	Job Data
005387116	0	Full-Time	40.00	Seal,Lou	Job Data

Save Return to Search Previous in List Next in List Notify Previous tab Next tab Add Update/Display

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [CSU 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

Add/Update Position Info
Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Position Number:
Description:
Position Status:
Business Unit:
Department:
Job Code:
Reports To Position Number:
☐ Include History ☒ Correct History ☐ Case Sensitive
[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)
[Find an Existing Value](#) [Add a New Value](#)

The Description page displays.

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

Description [Specific Information](#) [Budget and Incumbents](#) [CSU Position Data](#)

Position Information Find | View All First 1 of 3 Last

Position Number: 00009812
Headcount Status: Filled Current Head Count: 1 out of 1
*Effective Date: 01/01/2007 *Status: Active
Reason: JRC Job Reclassification Action Date: 11/12/2006
*Position Status: Approved Status Date: 11/01/2006 ☐ Key Position

Job Information

*Business Unit: HAY Cal State East Bay
Job Code: 3312 Administrator II Manager Level: Non-Manager
*Reg/Temp: Regular *Full/Part Time: Full-Time
*Regular Shift: N/A Union Code: M80 Management Personnel Plan
Title: Mgr. Communication Short Title: ADMIN 2 [Detailed Position Description](#)

Work Location

*Reg Region: USA United States

Note the change that was made:

- Title

Note: At this time, changes to any other value could be made as well.

Description [Specific Information](#) [Budget and Incumbents](#) [CSU Position Data](#)

Position Information Find | View All First 1 of 3 Last

Position Number: 00009812
Headcount Status: Filled Current Head Count: 1 out of 1
*Effective Date: 01/01/2007 *Status: Active
Reason: JRC Job Reclassification Action Date: 11/12/2006
*Position Status: Approved Status Date: 11/01/2006 ☐ Key Position

Job Information

*Business Unit: HAY Cal State East Bay
Job Code: 3312 Administrator II Manager Level: Non-Manager
*Reg/Temp: Regular *Full/Part Time: Full-Time
*Regular Shift: N/A Union Code: M80 Management Personnel Plan
Title: Mgr. Project Communication Short Title: ADMIN 2 [Detailed Position Description](#)

Work Location

*Reg Region: USA United States

Note the original information at the bottom of the page.

Work Location

*Reg Region: United States

Department: CMS Project Office Company: HAY Cal State East Bay

Location: Acctg & Admin Systems

Reports To: Mgr, Training & Support/HR PM Dot-Line: Senior Manager, CMS Project

Supervisor Lvl:

Salary Plan Information

Salary Admin Plan: Grade: Step:

Standard Hours: Work Period: Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

USA

Save Return to Search Previous in List Next in List Notify Previous tab Next tab Add Update/Display

Description | Specific Information | Budget and Incumbents | CSU Position Data

And the changes...

Work Location

*Reg Region: United States

Department: CMS Project Office Company: HAY Cal State East Bay

Location: Acctg & Admin Systems

Reports To: Senior Manager, CMS Project Dot-Line: Mgr, Training & Support/HR PM

Supervisor Lvl:

Salary Plan Information

Salary Admin Plan: Grade: Step:

Standard Hours: Work Period: Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

USA

Save Return to Search Previous in List Next in List Notify Previous tab Next tab Add Update/Display

Description | Specific Information | Budget and Incumbents | CSU Position Data

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

Description | Specific Information | Budget and Incumbents | CSU Position Data

Position Number: 00009812

Headcount Status: Filled Current Head Count: 1 out of 1

Specific Information Find | View All First 1 of 3 Last

Effective Date: 01/01/2007 Status: Active

Job Profile ID:

Max Head Count:

Mail Drop ID:

Work Phone:

Health Certificate:

Signature Authority:

Incumbents

☒ Update Incumbents

☒ Include Salary Plan/Grade

☒ Budgeted Position

☐ Confidential Position

☐ Job Sharing Permitted

Education and Government

Position Pool ID: GFSuppApp

*Pre-Encumbrance Indicator:

*Encumber Salary Option:

*Classified Indicator:

Calc Group (Flex Service):

Academic Rank:

FTE: ☐ Adds to FTE Actual Count

If necessary, navigate to the CSU Position Data for changes

3. Note the original data

The screenshot shows the 'CSU Position Data' form with the following fields and values:

- Position Number: 00009812
- Headcount Status: Filled
- Current Head Count: 1 out of 1
- Effective Date: 01/01/2007
- Unit: 006 Vice President Administration
- Primary Fund: TRST Trust, Other
- MPP Job Family Code: I Information Technology
- MPP Job Function: 12 User Support Services
- MPP Reporting Category: 7 Supervisor 1

Navigation buttons at the bottom include: Save, Return to Search, Previous in List, Next in List, Notify, Previous tab, Next tab, Add, and Update/Display.

And the changes...

The screenshot shows the 'CSU Position Data' form with the following fields and values:

- Position Number: 00009812
- Headcount Status: Filled
- Current Head Count: 1 out of 1
- Effective Date: 01/01/2007
- Unit: 042 Acct/Systems and Technology
- Primary Fund: GFND General Fund
- MPP Job Family Code: I Information Technology
- MPP Job Function: 12 User Support Services
- MPP Reporting Category: 7 Supervisor 1

Navigation buttons at the bottom include: Save, Return to Search, Previous in List, Next in List, Notify, Previous tab, Next tab, Add, and Update/Display.

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

4. Click OK

The screenshot shows a Microsoft Internet Explorer warning message with a yellow triangle icon. The text reads:

The incumbent update has changed the Salary Plan information for employee 005387116 on the following Job Data rows:
Prior Salary Plan M07, Grade 1, Step <blank>
New Salary Plan M07, Grade 1, Step <blank>

Please review these Job Data rows. The Salary Plan changes may be inappropriate for the incumbent and should be reviewed. (0,0)

There is an 'OK' button at the bottom right.

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.

The screenshot shows the 'Work Location' page for employee 005387116. The page includes the following information:

- Seal, Lou EMP ID: 005387116 Empl Rcd #: 0
- HR Status: Active Payroll Status: Active
- *Effective Date: 01/01/2007 Sequence: 0 *Job Indicator: Primary Job
- Action / Reason: Position Change Job Reclassification
- Last Start Date: 11/06/2006 Termination Date: Future
- Expected Job End Date: [blank]
- Position Number: 00009812 Mgr. Project Communication Position Entry Date: 11/06/2006
- Override Position Data checkbox checked Position Management Record checkbox checked
- Regulatory Region: USA United States
- Company: HAY Cal State East Bay
- Business Unit: HAY Cal State East Bay
- Department: 1207 CMS Project Office Department Entry Date: 01/01/2007
- Location: 0042 Acctg & Admin Systems
- Establishment ID: HAY Cal State East Bay

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

Work Location | Job Information | Job Labor | Payroll | Salary Plan | CSU Job | Compensation | CSU Faculty Job

Seal, Lou EMP ID: 005387116 Empl Rcd #: 0

Job Information Find | View All First 1 of 3 Last

Effective Date: 01/01/2007 Effective Sequence: 0 Job Indicator: Primary Job
 Action / Reason: Posn Chg Job Reclassification Future

Job Code: 3312 Administrator II Entry Date: 01/01/2007
 Supervisor Level:
 Supervisor ID:
 Reports To: 00005748 Senior Manager, CMS Project 000041653 Radisch, Marilyn

Regular/Temporary: Regular Full/Part: Full-Time
 Empl Class: Regular *Officer Code: None
 Regular Shift: N/A Shift Rate: /
 Classified Indc: All

Standard Hours
 Standard Hours: 40.00

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

Work Location | Job Information | Job Labor | Payroll | Salary Plan | CSU Job | Compensation | CSU Faculty Job

Seal, Lou EMP ID: 005387116 Empl Rcd #: 0

CSU Job Find | View All First 1 of 3 Last

Effective Date: 01/01/2007 Effective Sequence: 0 Job Indicator: Primary Job
 Action / Reason: Posn Chg Job Reclassification Future

*PPT Status: Pay Ready Run Date: 01/01/2007
 *Probation Code: None Prob End:
 *Anniversary Code: Eligible Anni Month / Year: 01 / 2008
 Retirement Code: 08 PERS-SS/MED Pay End Date:
 Legal Reference: Red Circle Date:
 AY Dur of Appt: Empl History Remarks:

Unit: 042 Acct/S&T
 Primary Fund: GFND General Fund
 PPT Processing
 Comments:

Job Data Employment Data Earnings Distribution Benefits Program Participation

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

Description | **Specific Information** | **Budget and Incumbents** | **CSU Position Data**

Position Information Find | View All First 1 of 2 Last

Position Number: 00008362
Headcount Status: Filled Current Head Count: 1 out of 1
*Effective Date: 01/01/2005 *Status: Active
Reason: TTL Title Change Action Date: 06/29/2005
*Position Status: Approved Status Date: 05/10/2004 ☐ Key Position

Job Information

*Business Unit: HAY Cal State East Bay
Job Code: 3312 Administrator II Manager Level: Non-Manager
*Reg/Temp: Regular *Full/Part Time: Full-Time
*Regular Shift: N/A Union Code: M80 Management Personnel Plan
Title: CMS Consultant Short Title: ADMN 2 [Detailed Position Description](#)

Work Location

*Reg Region: USA United States

2. Note the changes made

Work Location

*Reg Region: USA United States
Department: 1207 CMS Project Office Company: HAY Cal State East Bay
Location: 0042 Acctg & Admin Systems
Reports To: 00000018 Interim A/P, Admin Syst & Fin Dot-Line: 00004485 Dir, Accounting & Financial Sys
Supervisor Lvl:

Salary Plan Information

Salary Admin Plan: M07 Grade: 1 Step:
Standard Hours: 40.00 Work Period: W Weekly
Mon Tue Wed Thu Fri Sat Sun
8.00 8.00 8.00 8.00 8.00

USA

Save Return to Search Previous in List Next in List Notify Previous tab Next tab Add Update/Display

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [CSU Position Data](#)

Work Location

*Reg Region: USA United States
Department: 1207 CMS Project Office Company: HAY Cal State East Bay
Location: 0042 Acctg & Admin Systems
Reports To: 00005748 Senior Manager, CMS Project Dot-Line: 00004485 Dir, Accounting & Financial Sys
Supervisor Lvl:

Salary Plan Information

Salary Admin Plan: M07 Grade: 1 Step:
Standard Hours: 40.00 Work Period: W Weekly
Mon Tue Wed Thu Fri Sat Sun
8.00 8.00 8.00 8.00 8.00

USA

Save Return to Search Previous in List Next in List Notify Previous tab Next tab Add Update/Display

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [CSU Position Data](#)

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

- 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.

Note the changes made.

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) (<http://www.csueastbay.edu/servicedesk>).