TOPIC 4: MAINTAINING POSITIONS

After a position is defined in the system, changes to that position may need to be made. The Position Status Maintenance (PSMT) window is used to change the status of an existing position and to change profile attributes of a position. The Position Authorization (PAMT) window is used to change the number of incumbents and FTEs allowed for a position.

The purpose of this topic is to walk you through several scenarios regarding changes that may need to be made to positions after they have been established in the system.

At the end of this topic, you will be able to:

- Change basic position information
- Reallocate a position
- Place a position on hold and remove the hold
- Describe how a position is restricted
- Inactivate and reactivate a position

POSITION CONTROL PROCESS CHART

Step 1: REFERENCE TABLES

- Title (TITL)
- Sub-Title (STTL)
- Civil Service Status (CIVS)
- Pay Class (PYCL)

Step 2: ESTABLISHING POSITIONS

1. Complete the Position Status Maintenance (PSMT)
2. Complete the Position Authorization (PAMT)
3. Complete the Position User Defined Windows (PUD1, PUD2, PUD3) as required

Step 3: MAINTAINING POSITIONS

- Maintain Position Info (PSMT)
- Reallocate a Position (PSMT)
- Hold a Position (PSMT)
- Restrict a Position (PSMT)
- Inactivate a Position (PSMT/PAMT)
- Change Incumbents or FTEs (PAMT)
- Change Overfill Capacity (PAMT)

Step 4: POSITION CONTROL INQUIRIES

- Position Folder (QPSTF)
- Position by Title Inquiry (QPTL)
- Position Roster (QPSR)
- Title Categories for Title (QTCT)
- Position Status Inquiry (QPST)
- Position Authorization Inquiry (QPAT)

MAINTAINING POSITIONS

There are several situations that require you to change a position. The most common types of changes will involve modifying information located on the Position Status Maintenance (PSMT), Position Authorization (PAMT) or Position User Defined (PUD1-3) windows. At this point, you will also want to take an action such as reallocating a position, holding a position, restricting a position or inactivating a position.

Let's review some of the changes you could make in the PSMT. For UCP agencies changes to position information may be subject to approval by the Division of Personnel.

POSITION STATUS – If the position's existing status code is ACTVA or TEMPA, it must be changed to one of the status codes listed below in order to change other fields on the PSMT. If the position's existing status code is one of the status codes listed below, it need not be changed to change other fields on the PSMT. Enter one of the following codes to change the position's status:

- **ACTVE** – (ACTIVE – EDIT) to make changes to a permanent position.
- **TEMPE** – (TEMP-EDIT) to make changes to a temporary position. Note: Temporary positions are not included in budget projections done in the Budget Report and Analysis Support System (BRASS).
- **RSTRT** – (RESTRICTED-BUDGETED) to restrict a position that is permanent and should be included in BRASS budget projections.
- **RSTRN** – (RESTRICTED-NONBUDGETED) to restrict a position that is temporary OR to restrict a position that is permanent and should not be included in BRASS budget projections.
- **HOLDB** - (HOLD-BUDGETED) to hold a position that is permanent and should be included in BRASS budget projections.
- **HOLDN** – (HOLD-NONBUDGETED) to hold a position that is temporary OR to hold a position that is permanent and should not be included in BRASS budget projections.
- **INACT** – (INACTIVE) to inactivate a position.

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Step 2: ESTABLISHING POSITIONS

Complete the Position Status Maintenance (PSMT)

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Complete the Position Authorization (PAMT)

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Complete the Position User Defined Windows (PUD1, PUD2, PUD3) as required

Step 4: POSITION CONTROL INQUIRIES

- Position Folder (QPSTF)
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MAINTAINING POSITIONS

TITLE – Enter the code that identifies the title for the position. Valid title codes can be found on the Title (TITL) window.

Note: All UCP title codes begin with the number "0". Title codes for Non-UCP agencies beginning with a character that has been assigned to the agency. (For detailed instructions on how to change a position's title, refer to the procedures for Reallocating a Position.)

TITLE CATEGORY – If multiple titles are associated with the position, enter the code that identifies all of the associated titles (e.g., multi-allocations, job clusters, trainee assignments, etc.). If multiple titles are not associated with the position, make sure this field is blank. Valid title category codes can be found on the Title Category (TCAT) window. To view a list of all of the titles associated with a title category, refer to the Titles in Title Category (TICA) window. (For detailed instructions on how to change a position's title category, refer to the procedures for Reallocating a Position.)

LABOR DISTRIBUTION OVERRIDE OPTION – The SAM II/HR Payroll System provides the option of establishing labor distributions at the position or employee level. However, to ensure that payroll expenditures are charged to a budget line, the State of Missouri requires that a labor distribution be established at the position level. Therefore, the Labor Distribution Override Option – USE EMPLOYEE ASSIGNMENT must not be used. If an agency wishes to tie labor distribution information to an employee, the position's labor distribution can be overridden at the employee level.

Some of the common changes you can make on the PAMT include the Authorized Incumbents, Authorized FTEs and Overfill Authorization.

Most positions should be established on a one position to one employee basis. However it may be necessary to change the position authorization to accommodate dual or multiple occupancies.

Note: A dual occupancy is used when two employees temporarily occupy the same position in order to facilitate special situations, such as on-the-job training for a replacement prior to the departure of incumbent. A multiple occupancy is used when two or more incumbents occupy the same unclassified position, such as seasonal workers.

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Step 2: ESTABLISHING POSITIONS

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MAINTAINING POSITIONS

A position reallocation involves making a change to the position's title and, in some instances, title category. A position's title establishes job information including FLSA exemption, EEO category, occupational group, grade, union membership, and salary minimum and maximum. A title category is used to tie multiple titles to a position (i.e., multi-allocations, job clusters and trainee assignments). Changes to a position's title/title category are entered on the Position Attributes Panel of the PSMT. After the changes to the PSMT have been accepted by the system, specialty code information may also need to be updated on the Position Control User Defined Window 2 (PUD2) to reflect the position's new title.

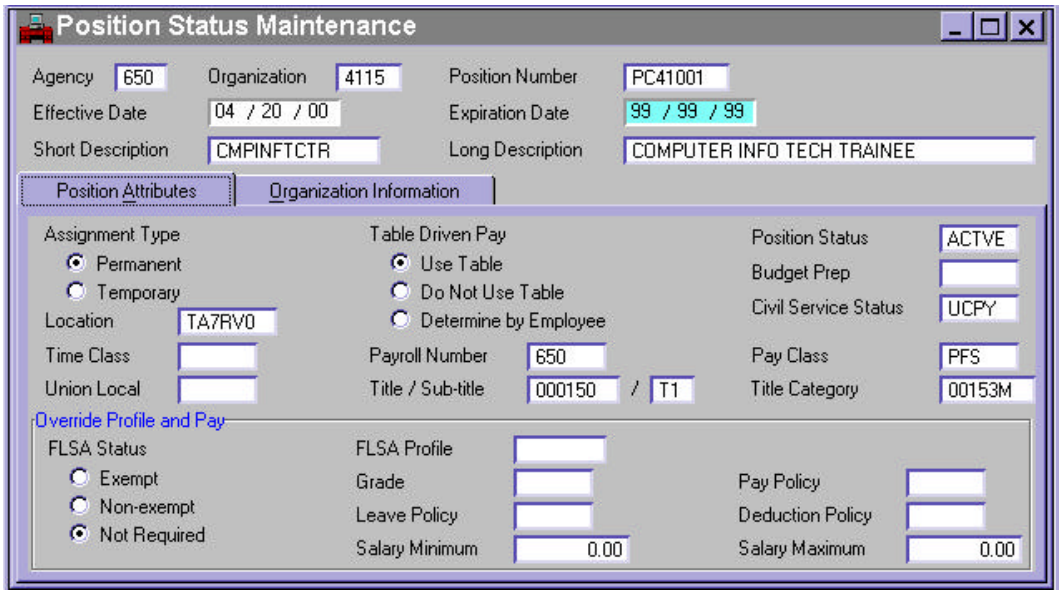
A position may be put on hold whether it is filled or vacant. However, once vacant, it may not be refilled until the hold is removed. It is at the agency's discretion to determine whether or not a position on hold should be included in budget projections done in the Budget Report and Analysis Support System (BRASS). To put a position on hold, the information is entered on the PSMT.

A position may be restricted whether it is filled or vacant. However, once vacant, it may not be refilled until the restriction is removed. Restricting a position will be conducted by the Division of Personnel for UCP agencies and by the designated staff members for Non-UCP agencies. The Division of Personnel is responsible for determining when to restrict a UCP position; however, the agency has the discretion to determine whether or not vacant restricted positions should be included in BRASS budget projections. The Division of Personnel will assume that all vacant restricted positions will be budgeted, unless otherwise notified by the agency. Restricting a position is identical to a hold unless defined otherwise by Non-UCP agencies. To restrict a position and to remove a restriction, the information is entered on the PSMT.

A position may be inactivated when it is determined that it will no longer be staffed and/or budgeted by the agency. The State of Missouri requires that a position be vacant before it is inactivated. Once inactivated, a position cannot be filled unless it is reactivated. The Position Authorization (PAMT) window is used to delete the position's incumbent and FTE authorization. The PSMT is used to change the position's status to inactive.

Let's work through some detailed scenarios to help you see how this process will work in the "real world".

POSITION STATUS MAINTENANCE (PSMT)



NOTES

CHANGING POSITION INFORMATION

SCENARIO

Remember the Computer Information Technologist Trainee I-II-III position you established for the Department of Mental Health? Due to changes in funding for this position, you need to update the labor distribution profile on the PSMT.

In order to change the labor distribution profile on a position, the information must be entered on the PSMT.

Step 1 Open the PSMT.

Step 2 Enter the required information in the following fields.

AGENCY – Type **650**.

ORGANIZATION – Type **4115**.

POSITION NUMBER – **SEE STUDENT CARD**.

Select **Display: Browse Data.**

Step 3 Enter the information you are changing on the PSMT window.

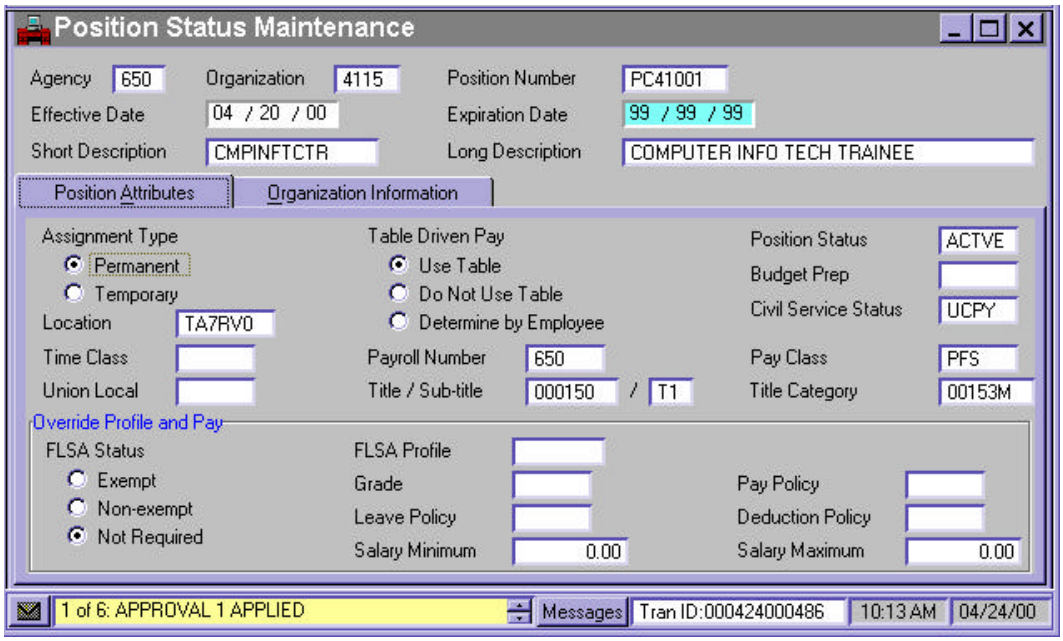
EFFECTIVE DATE – Type **TODAY'S DATE**.

POSITION STATUS –Type **ACTVE**.

LABOR DISTRIBUTION OVERRIDE OPTION – Select **USE ENTERED PROFILE**.

DISTRIBUTION PROFILE – Type **S0389**.

POSITION STATUS MAINTENANCE (PSMT)



NOTES

CHANGING POSITION INFORMATION (PSMT) APPROVAL PROCESS

Now, let's complete the approval processing of the PSMT.

Step 1 Select **Process: Update.**

If the transaction contains errors, messages will appear specifying the errors. You would need to correct the errors and repeat Step 1. If your transaction is free of errors, a message will appear in the yellow message bar at the bottom of the transaction window telling you that approvals are ready to be applied.

Step 2 Close the transaction. Workflow will now route the transaction as needed.

Note: For training purposes, you will stop at this point. The instructor will complete the next step. However, in the "real world", you would perform one of the following step to apply additional levels of approval. Your ability to apply different levels of approval will be determined by your security profile.

Applying Additional but Not Final Approvals

Step 3 Select **Process: Approve.**

Step 4 Close the transaction. Workflow will now route the transaction as needed.

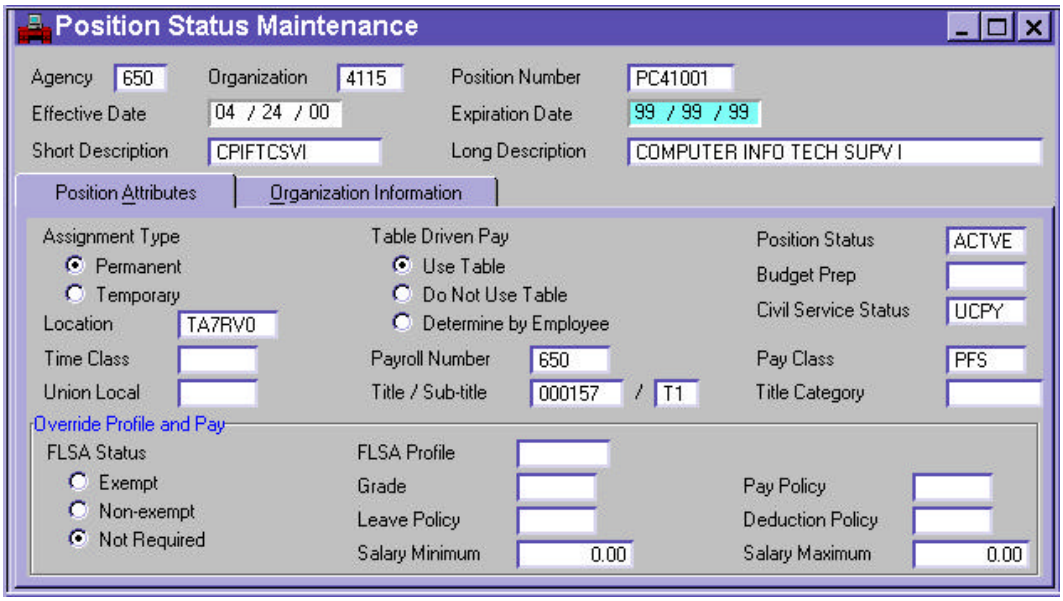
OR

Applying Final Approval

Step 3 Select **Process: Approve-Update.**

Step 4 Close the transaction.

POSITION STATUS MAINTENANCE (PSMT)



NOTES

REALLOCATING A POSITION (Title/Title Category Change)

SCENARIO

For the last five years, you have had a Computer Information Technologist Trainee I-II-III position in your agency. Due to an expansion and reorganization in the IT shop, this position is now functioning as a Computer Information Technologist Supervisor and needs to be reallocated.

A position reallocation involves making a change to the position's title. To reallocate a position, the information must be entered on the PSMT.

Step 1 Open the PSMT.

Step 2 Enter the required information in the following fields.

AGENCY – Type **650**.

ORGANIZATION – Type **4115**.

POSITION NUMBER – **SEE STUDENT CARD**.

Select **Display: Browse Data.**

Step 3 Enter the information you are changing on the PSMT window.

EFFECTIVE DATE – Type **TODAY'S DATE**.

SHORT DESCRIPTION – Type **CPIFTCSV I**.

LONG DESCRIPTION – Type **COMPUTER INFO TECH SUPV I**.

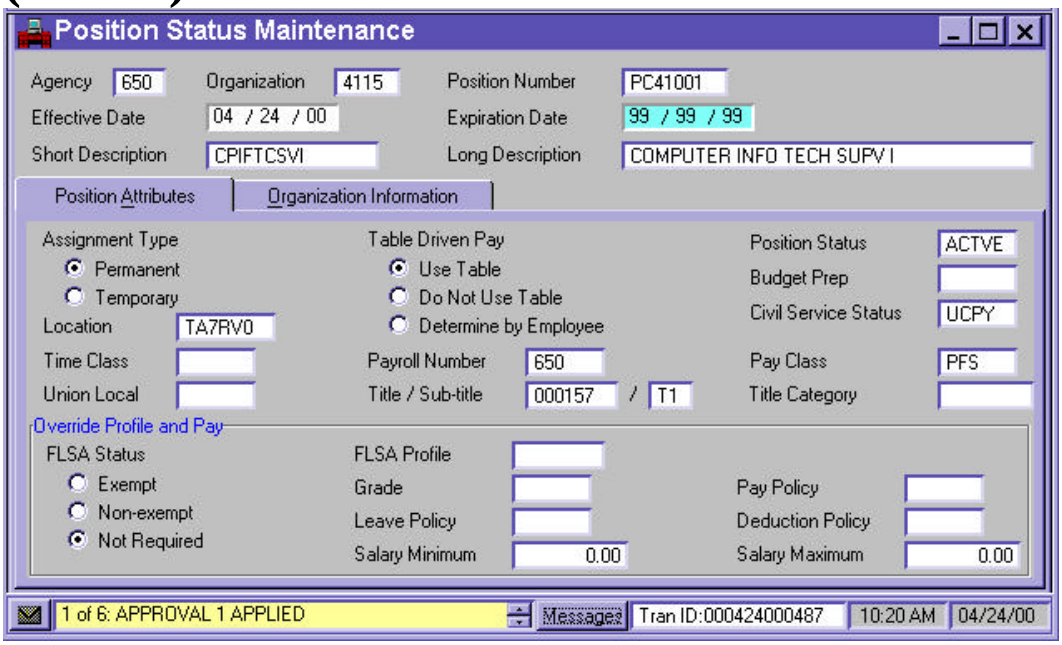
TABLE DRIVEN PAY – Select **Use Table**.

POSITION STATUS – Type **ACTVE**.

TITLE – Type **000157**.

TITLE CATEGORY – Blank out this field.

POSITION STATUS MAINTENANCE (PSMT)



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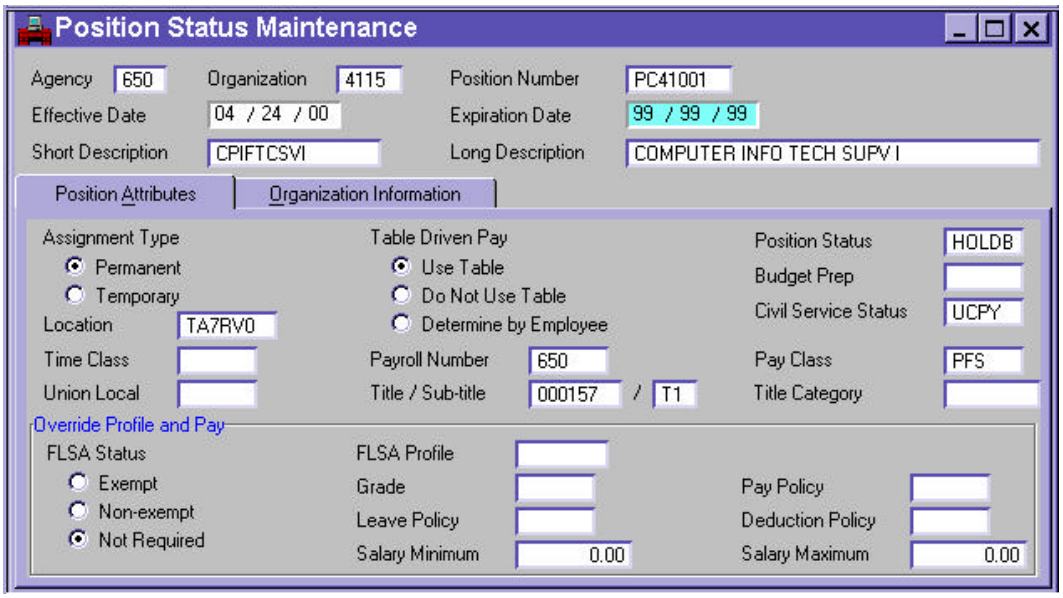


NOTES

HOLDING A POSITION

SCENARIO

The employee who was filling the Computer Information Technologist Supervisor position has retired and the position has become vacant. From now until July you want to use the funds from that position for a special project (i.e. SAM II). You put the position on hold so it cannot be filled.

In order to put a position on hold, information must be entered on the PSMT.

Step 1 Open the PSMT.

Step 2 Enter the required information in the following fields.

AGENCY – Type **650**.

ORGANIZATION – Type **4115**.

POSITION NUMBER – **SEE STUDENT CARD**.

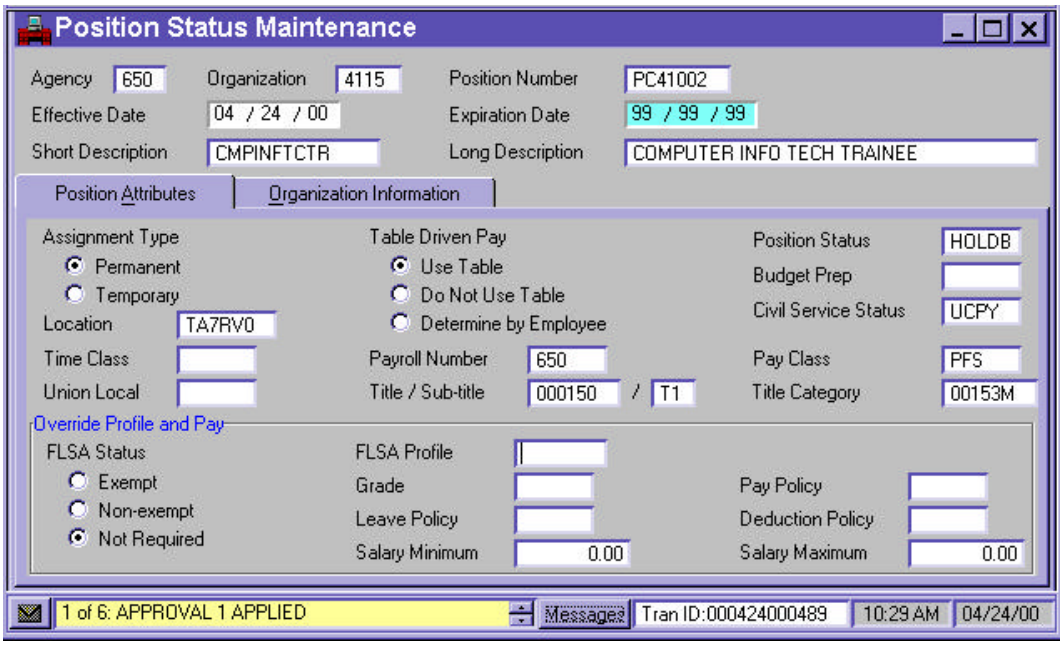
Select **Display: Browse Data.**

Step 3 Enter the information you are changing on the PSMT window.

EFFECTIVE DATE – Type **TODAY'S DATE**.

POSITION STATUS – Type **HOLDB**.

POSITION STATUS MAINTENANCE (PSMT)



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HOLDING A POSITION APPROVAL PROCESS

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Position Status Maintenance (PSMT)