

**NC STATE UNIVERSITY**

# 9.1 User Guide for Processing an EPA Position Change

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This user guide covers the fundamentals of processing a title change on an EPA position along with a pay rate change.

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## Introduction

Before processing any changes to a position in PeopleSoft, please ensure that approvals have been received from the appropriate individuals in Central Office Human Resources.

**Navigation Ref:** (HR Systems>Organizational Development> Position Management>Maintain Position/Budgets > Add/Update Position Info)

## Position Change Scenario

In this scenario we will review a sample of an endorsed position change email received from Human Resources – EPA Administration and process the appropriate changes on the Position Data screen. We will then process a pay rate change on Job Data due to the title change.

## Sample of Position Change Approval Email

This is a sample of an approval email that will be sent from Human Resources. The email will contain the approved changes and instructions on how to process the changes.

We have received approval from the UNC Board of Governors, and the base salary adjustment request submitted for Emily Foley has been endorsed by EPA Administration with an effective date of 10/01/2014. Below are the specifics of the endorsed EPA job action:

### **I. Incumbent Job Information**

**Employee ID:** 000999999  
**Name:** Kathryn Wolfpack  
**Working Title:** Extension Associate

### **II. Position Information**

**OUC:** 111401 - Youth, Family, & Community Sciences  
**Position Number:** 000999999  
**Title:** C333P - Extension Associate  
**Position Type:** EPA Non-Faculty  
**EPA Category:** Public Service / Extension  
**Appointment Length:** 12 Month Recurring  
**FTE:** 1.00

### **III. Job Action Information**

**PeopleAdmin Action #:** AC150173EP  
**Type of EPA Action:** Title Change  
**Type of Salary Action:** Title Change  
**Endorsed annualized base salary:** \$56,000  
**Annualized amount of salary adjustment:** \$14,520  
**% of annualized salary adjustment:** 35%  
**Basis for Request:** Request of title change from Extension Assistant to Extension Associate.

### **IV. Status of Requested Action**

**Action Status:** Approved as Requested  
**Type of Action:** Title Change  
**Date Approved:** 10/24/2014  
**Effective Date:** 10/01/2014

To further assist with this action, here are instructions for entering this action into the HR (PeopleSoft) System:

#### **Position Action Entry**

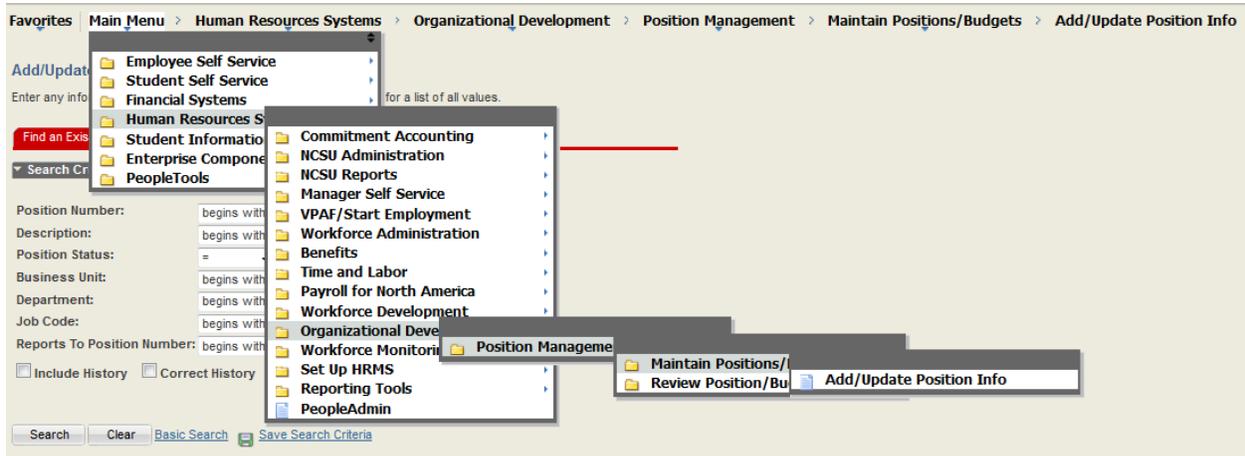
1. Select Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
2. Insert a new row
3. In the Work Location panel, enter the appropriate effective date
4. Select Action: Position Change (POS)
5. Select Reason: REH - Reclass EPA Higher Title (C333P - Extension Associate)
6. Confirm that the Appointment length, Empl Class, and standard hours are correct.
7. Save the action

#### **Job Action Entry**

1. Select Workforce Administration> Job Information> Job Data
2. Insert a new row
3. In the Work Location panel, enter the appropriate effective date
4. Select Action: Pay Rate Change (PAY)
5. Select Reason: PRH - Pay Increase, Reclass
6. Go to the Compensation panel and change the salary
7. Calculate Compensation to display the new Compensation Rate
8. Save the action

## Position Data

Follow the navigation path below to the Add/Update Position Info screen to make the necessary changes.



To locate the position, fill in the 8-digit position number in appropriate field (including any leading zeros) and click **Search** button.

A screenshot of the 'Add/Update Position Info' search screen. The title is 'Add/Update Position Info' and the instruction is 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below is a 'Search Criteria' section with the following fields:

- Position Number: begins with dropdown, text input '00099999'
- Description: begins with dropdown, text input
- Position Status: = dropdown, dropdown menu
- Business Unit: begins with dropdown, text input with search icon
- Department: begins with dropdown, text input with search icon
- Job Code: begins with dropdown, text input with search icon
- Reports To Position Number: begins with dropdown, text input

At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. Buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' are at the bottom.

The most current position information will appear after the search is complete. On this screen you will see the most recent action that was performed on the position. Who and when the information was updated is located at the bottom of the panel.

**Description** | **Specific Information** | **Budget and Incumbents**

**Position Information** Find | View All First 2 of 8 Last

Position Number: 0099999 + -

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

\*Effective Date: 11/18/2013 ? \*Status: Active PAF

\*Reason: OCU ? Change OUC/Dept Action Date: 11/25/2013

\*Position Status: Approved Status Date: 05/12/2008 ?

Position Flagged Flagged Position Reason None Selected ? Recurring/Contract Length 12 Month ?

Time Limited (SPA) Mandatory/Essential/Key ? \*Empl Class ENF ? EPA Non-Faculty

**Job Information**

JCAT: 472X01 Extension / Engagement / Public Service Professional, Agricultural

\*Job Code: C316P ? Extension Asst

\*Regular Shift: N/A ?

\*Title: Extension Asst Short Title: ExAst Detailed Position Description

**Work Location**

\*Department: 111401 ? Family And Consumer Sciences

\*Location: 129 ? 4-H Youth Dev & Fam & Cons Sci

Reports To: 00001946 ? Coordinator

**Salary Plan Information**

Salary Admin Plan: EPAP ? Grade: 2 ? Step: 99 ?

Standard Hours: 40.00 ? Work Period: W ? Weekly

Shared Position FTE: 0.000000

**USA**

FLSA Status: Exempt ?

Updated on: 11/25/2013 12:47:40PM Updated By: KWLWS07 Katherine Wilson

[View Position Budget & Incumbent Information](#)

Save Return to Search Notify Add Update/Display Include History Correct History



To begin the process, click on the plus sign (+) in the top right hand corner of the Position Information section. This will add a row to the position screen. According to the approval email for this specific action, the highlighted sections will need to be updated. If you should need assistance, click on the magnifying glass that is located to the right of the text box. Once the text boxes have been updated, click **Save** at the bottom of the screen.

**Description** | **Specific Information** | **Budget and Incumbents**

**Position Information** Find | 1 of 1

Position Number: 0099999  
Headcount Status: Filled Current Head Count: 1 out of 1

\*Effective Date: 10/01/2014 \*Status: Active PAF  
\*Reason: REH Reclass EPA Higher Title Action Date: 11/03/2014  
\*Position Status: Approved Status Date: 05/12/2008  
 Position Flagged Flagged Position Reason None Selected Recurring/Contract Length 12 Month  
 Time Limited (SPA) Mandatory/Essential/Key Not Applic \*Empl Class ENF EPA Non-Faculty

**Job Information** JCAT: 472X01 Extension / Engagement / Public Service Professional, Agricultural

\*Job Code: C333P Extension Assoc  
\*Regular Shift: N/A  
\*Title: Extension Assoc Short Title: Extension Detailed Position Description

**Work Location**

\*Department: 111401 Youth, Family & Community Sci.  
\*Location: 129 4-H Youth Dev & Fam & Cons Sci  
Reports To: 00001946 Coordinator

**Salary Plan Information**

Salary Admin Plan: EPAP Grade: 2 Step: 99  
Standard Hours: 40.00 Work Period: W Weekly  
Shared Position FTE: 0.000000

USA  
FLSA Status: Exempt  
Updated on: 11/03/2014 9:11:37AM Updated By: DKJIMENE Denise Jimenez

[View Position Budget & Incumbent Information](#)

Save Return to Search Notify Add Update/Display Include History Correct History

To ensure the Position Data change automatically transitions to Job Data, review the **“Specific Information”** tab and verify the *“Update Incumbents”* and *“Include Salary Plan/Grade”* boxes are checked.

Position Number: 00099999  
 Headcount Status: Filled      Current Head Count: 1 out of 1

**Specific Information**      Find | View All      1 of 11      Last

Effective Date: 10/01/2014      Status: Active

Max Head Count:

Work Phone:

Health Certificate:

**Incumbents**

Update Incumbents  
 Include Salary Plan/Grade

Available for Telework

**Education and Government**

FTE: 1.000000       Adds to FTE Actual Count

Save    Return to Search    Notify    Add    Update/Display    Include History    Correct History

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

To verify that you are updating the correct incumbent assigned to the position click on the **“Budget and Incumbents”** tab. If the position update just entered and the incumbent are correct **“SAVE”** the position transaction.

Position Number: 00099999  
 Headcount Status: Filled      Current Head Count: 1 out of 1

**Budget and Incumbents**

**Current Incumbents**      Personalize | Find | 1 of 1

Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	Job Data
000999999	0	Full-Time	40.00	Kathryn Wolfpack	10/01/2014	Position Change	Reclass EPA Higher Title	N	<a href="#">Job Data</a>

Save    Return to Search    Notify    Add    Update/Display    Include History    Correct History

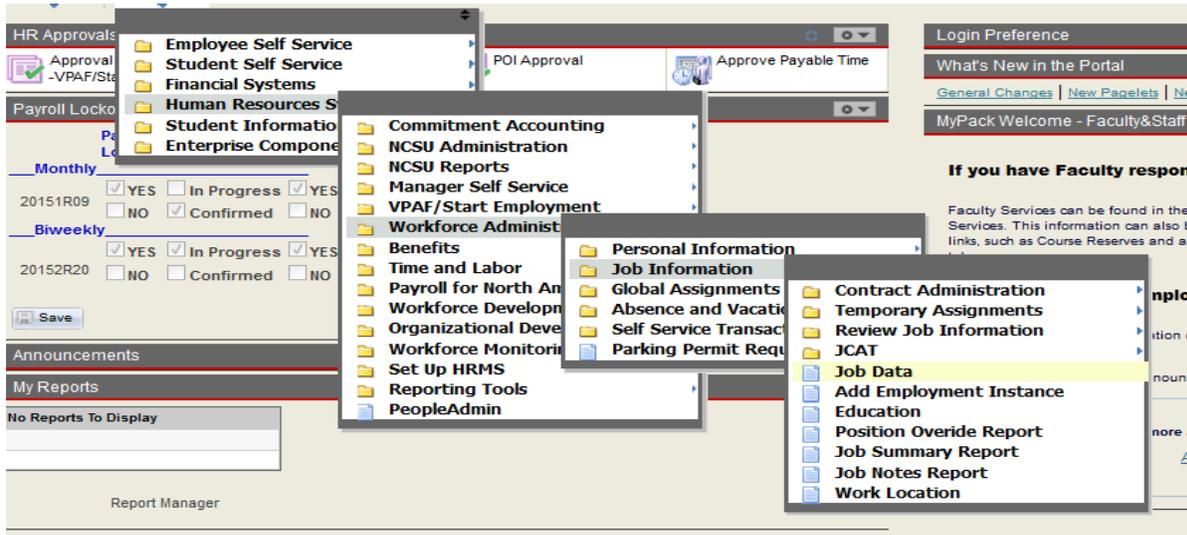
[Description](#) | [Specific Information](#) | [Budget and Incumbents](#)

**Note:** The Job Data panel can be accessed by clicking on the Job Data link above.

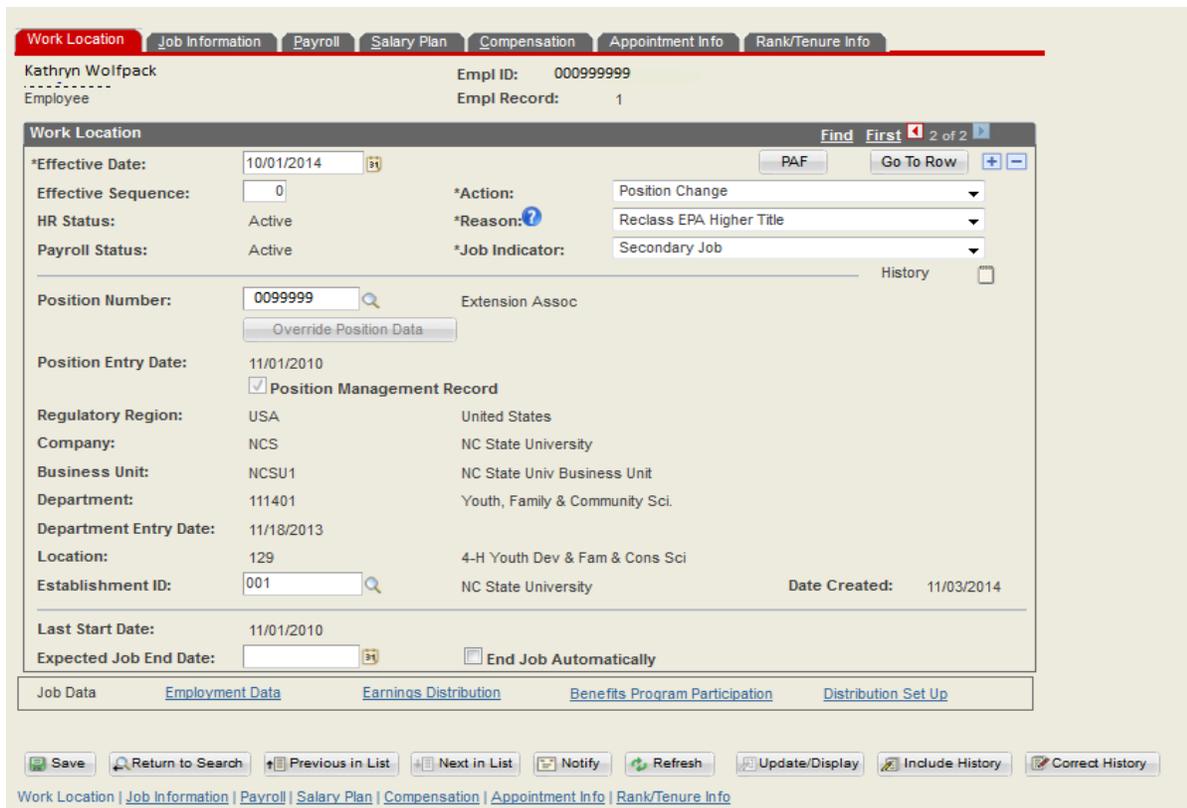
## Job Data

Once the position action has been saved then confirm the action transitioned correctly to job data. As noted on previous position “**Budget and Incumbents**” tab, job data is accessible from that panel. The job data panel can also be accessed from MYPACK Portal following the navigation path below.

Navigation: Main Menu->HR Systems->Workforce Administration->Job Information->Job Data



The following example reflects the position update.



The next step in this scenario is to process the Pay Rate Change that has been approved in association with position reclassification. Please review the approval email again before beginning this action.

To process the Pay Rate Change action verify the **“Work Location”** tab is selected then click on the plus sign (+) in the top right hand corner of the screen to add a row. Update the effective date and Action / Reason according to the approval details. Since the position and pay rate change actions are on the same date you will need to increase the effective sequence number by one number to reflect the pay rate change action. To view a complete list of Action / Reason definitions selecting the help link: [?](#).

**Work Location** | Job Information | Payroll | Salary Plan | Compensation | Appointment Info | Rank/Tenure Info

Kathryn Wolfpack  
Employee  
Empl ID: 000999999  
Empl Record: 1

**Work Location** Find 1 of 2

\*Effective Date: 10/01/2014 PAF Go To Row +

Effective Sequence: 1 \*Action: Pay Rate Change

HR Status: Active \*Reason: Pay Increase - Reclass

Payroll Status: Active \*Job Indicator: Primary Job

Position Number: 0099999 Extension Assoc  
Override Position Data

Position Entry Date: 11/01/2010  
 Position Management Record

Regulatory Region: USA United States

Company: NCS NC State University

Business Unit: NCSU1 NC State Univ Business Unit

Department: 111401 Youth, Family & Community Sci.

Department Entry Date: 11/18/2013

Location: 129 4-H Youth Dev & Fam & Cons Sci

Establishment ID: 001 NC State University Date Created: 11/03/2014

Last Start Date: 11/01/2010

Expected Job End Date:   End Job Automatically

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

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Update/Display | Include History | Correct History

[Work Location](#) | [Job Information](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#) | [Appointment Info](#) | [Rank/Tenure Info](#)

The next panel to update is located under the “**Compensation**” tab. Update the BASE salary comp rate field to reflect the approved salary. To confirm the new salary click on the “*Calculate Compensation*” button and the Compensation Rate section, highlighted in red, will reflect the new salary. Verify the data is correct then click **SAVE** to update job data.

The screenshot shows the 'Compensation' tab for employee Kathryn-Wolfpack (Empl ID: 000999999). The 'Compensation Rate' is set to 56,000.00 USD with an annual frequency. The 'Calculate Compensation' button is highlighted in yellow. At the bottom, the 'Save' button is also highlighted in yellow with a yellow arrow pointing to it.

*Rate Code	Help Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1	BASE	0	56,000.000000	USD	A		

All of the actions required to complete position and job data panels are now complete.

The next step is to file the transaction and the supporting paperwork in the employee file.

- Once the position and job data transactions have been saved email your designated HRIM Specialist all supporting documentation.
- If you have questions regarding the steps to complete the transition or the transaction does not save successfully contact your designated HRIM Specialist.

\*\*Edited by EM