

NC STATE UNIVERSITY

9.1 User Guide for Processing an EPA Position Change

Updated
3/23/2015
PS-Version 9.1

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

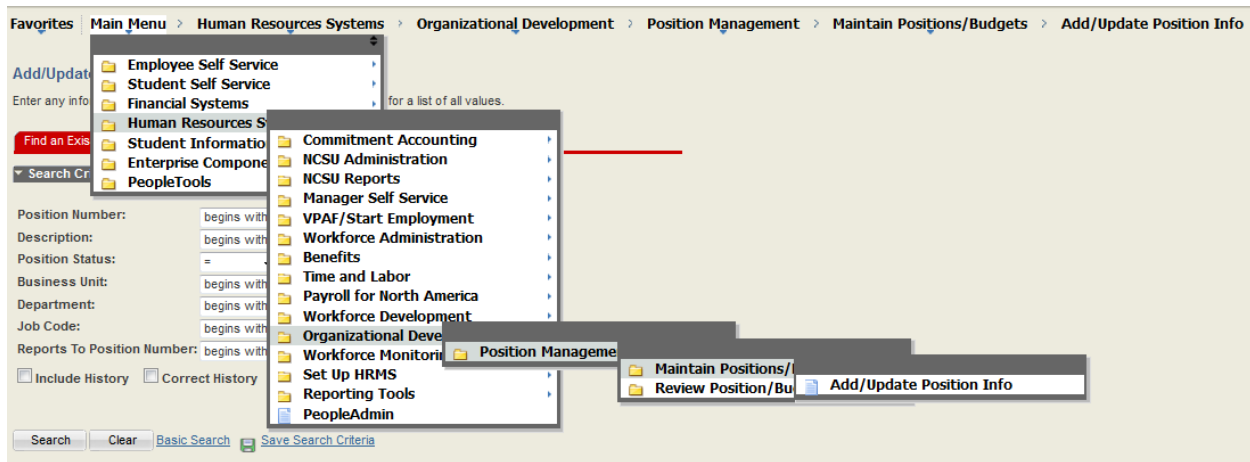
1. Select Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info
2. Insert a new row
3. In the Work Location panel, enter the appropriate effective date
4. Select Action: Position Change (POS)
5. Select Reason: REH - Reclass EPA Higher Title (C333P - 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.

The screenshot shows the **Add/Update Position Info** screen. The header includes the title **Add/Update Position Info** and the instruction: **Enter any information you have and click Search. Leave fields blank for a list of all values.** Below the header, there are two tabs: **Find an Existing Value** (selected) and **Add a New Value**. A **Search Criteria** dropdown menu is open, showing a list of options including **Employee Self Service**, **Student Self Service**, **Financial Systems**, **Human Resources S**, **Student Information**, **Enterprise Compone**, **PeopleTools**, **Commitment Accounting**, **NCSU Administration**, **NCSU Reports**, **Manager Self Service**, **VPAF/Start Employment**, **Workforce Administration**, **Benefits**, **Time and Labor**, **Payroll for North America**, **Workforce Development**, **Organizational Deve**, **Workforce Monitori**, **Position Manageme**, **Set Up HRMS**, **Reporting Tools**, **PeopleAdmin**, **Maintain Positions/B**, and **Add/Update Position Info**. The **Add/Update Position Info** option is highlighted. Below the search criteria, there are several input fields for search criteria: **Position Number:** (begins with 00099999), **Description:** (begins with), **Position Status:** (=), **Business Unit:** (begins with), **Department:** (begins with), **Job Code:** (begins with), and **Reports To Position Number:** (begins with). There are also checkboxes for **Include History**, **Correct History**, and **Case Sensitive**. At the bottom, there are buttons for **Search**, **Clear**, **Basic Search**, and **Save Search Criteria**.

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: KLWLSO7 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.

The screenshot shows a web-based form for Position Information. At the top, there are tabs: Description (selected), Specific Information, and Budget and Incumbents. The form is divided into several sections: Position Information, Job Information, Work Location, Salary Plan Information, and USA. A yellow arrow points to a plus sign (+) in the top right corner of the Position Information section. Another yellow arrow points to the Save button at the bottom left. The form contains various fields with values and search icons (magnifying glasses). Some fields are highlighted in yellow: Effective Date (10/01/2014), Reason (REH), Title (Extension Assoc), and the Save button.

Position Information

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 Applicable
*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

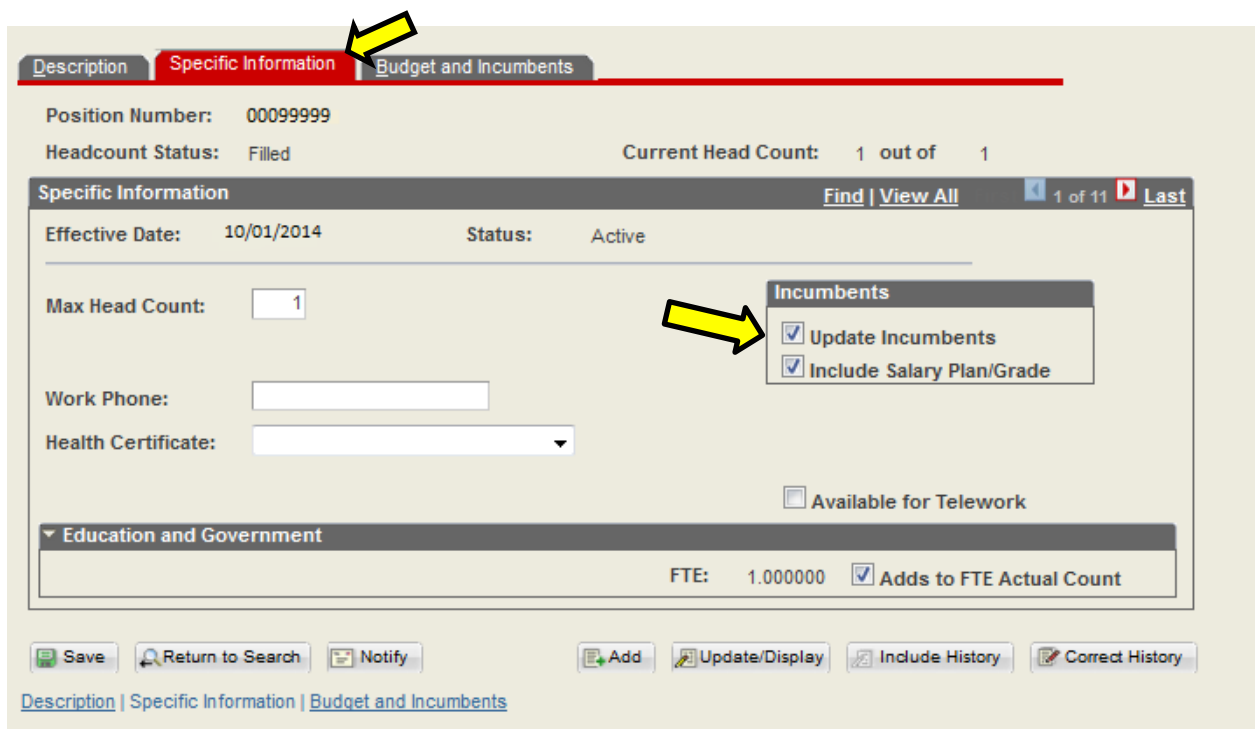
USA

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

[View Position Budget & Incumbent Information](#)

Buttons: 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: 1

Work Phone:

Health Certificate:

☐ Available for Telework

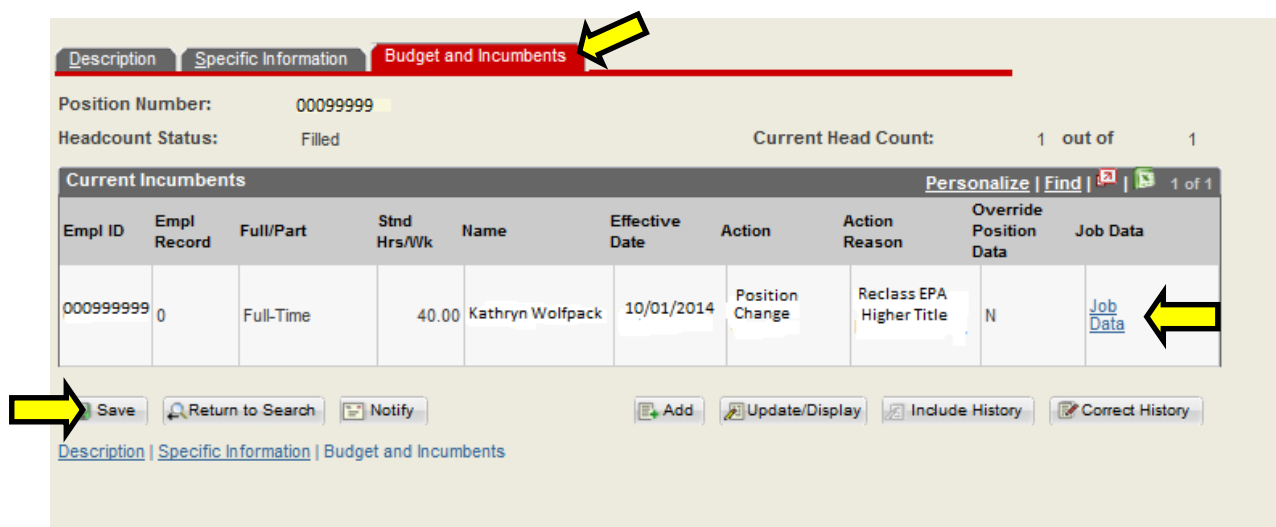
Education and Government

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 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	Job Data

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

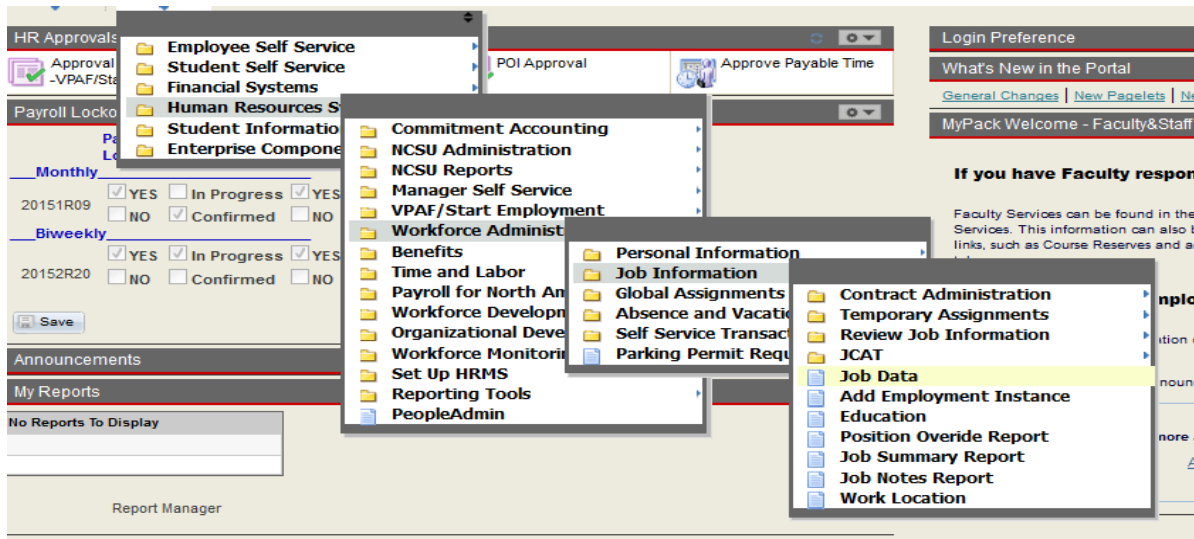
[Description](#) | [Specific Information](#) | [Budget and Incumbents](#)

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 List update.

A screenshot of the 'Job Data' form for Kathryn Wolfpack. The form is divided into several sections. At the top, there are tabs for 'Work Location', 'Job Information', 'Payroll', 'Salary Plan', 'Compensation', 'Appointment Info', and 'Rank/Tenure Info'. The 'Work Location' tab is active. The form displays employee information: Kathryn Wolfpack, Employee ID: 000999999, Empl Record: 1. Below this, there are fields for 'Effective Date' (10/01/2014), 'Effective Sequence' (0), 'HR Status' (Active), and 'Payroll Status' (Active). The 'Position Number' is 0099999, and the 'Position Entry Date' is 11/01/2010. The 'Regulatory Region' is USA, 'Company' is NCSU, 'Business Unit' is NCSU1, and 'Department' is 111401. The 'Location' is 129, and the 'Establishment ID' is 001. The 'Last Start Date' is 11/01/2010, and the 'Expected Job End Date' is blank. The form also includes a 'History' button and a 'Find' button. At the bottom, there are links for 'Job Data', 'Employment Data', 'Earnings Distribution', 'Benefits Program Participation', and 'Distribution Set Up'. The footer contains a row of buttons: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Update/Display, Include History, and Correct History.

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
Effective Sequence: 1
HR Status: Active
Payroll Status: Active

*Action: Pay Rate Change
*Reason: Pay Increase - Reclass
*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 HR system interface for Kathryn Wolfpack. The **Compensation** tab is selected, indicated by a yellow arrow. The employee's Empl ID is 000999999 and Empl Record is 1. The Compensation section shows an Effective Date of 10/01/2014, Effective Sequence of 1, and HR Status of Active. The Compensation Rate is highlighted in red and set to 56,000.00. The Pay Rates table shows a rate of 56,000.000000. The Calculate Compensation button is highlighted in yellow. The Save button at the bottom is also highlighted with a yellow arrow.

*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