

**NC STATE UNIVERSITY**

# 9.1 User Guide for Processing a SPA Position Change

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Updated  
2/18/2015  
PS-Version 9.1

This user guide covers the fundamentals of processing approved position changes in the HR System.

## Contents

Introduction .....	2
Position Change Scenario.....	2
Sample of Position Change Approval Email .....	3
Processing a Position Change on a Vacant Position .....	4
Position Data (Vacant position) .....	4
Processing a Position Change on a Filled Position .....	7
Sample of Position Change Approval Email .....	7
Position Data (Filled position) .....	8
Job Data .....	12

## Introduction

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

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

## Position Change Scenario

In the first scenario (vacant) we will review a sample of an endorsed position change email received from Central Human Resources – Talent and Organizational Solutions and process the appropriate changes on the Position Data screen. The position is vacant and being prepared for posting and recruitment.

In the second scenario (filled) we will review a sample of an endorsed position change and pay rate change from Central Human Resources – Talen and Organizational Solutions and process the appropriate changes on the Position Data and Job Data screens.

## 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.

This email serves as confirmation that review of PeopleAdmin action #AC15064SP is complete. As requested, position#00099999 is endorsed for reclassification from Administrative Support Specialist/Journey to University Program Associate at the Journey level.

Please note that the position is Non-Exempt from the provisions of the Fair Labor Standards Act (FLSA); therefore, incumbents of this position must maintain a monthly time sheet and are overtime (comp time) eligible for hours physically worked beyond 40 in a work week. Comp time may be awarded in lieu of overtime pay out, in accordance with your college/divisional practices. Please reference the following link for additional information on FLSA: [http://www.ncsu.edu/human\\_resources/classcomp/flsa.php](http://www.ncsu.edu/human_resources/classcomp/flsa.php).

Please ensure a PeopleSoft action is entered effective 01/12/2015. For your reference, a detailed summary of the salary change is included below, along with instructions for entering the PeopleSoft action.

### **Summary of Endorsed PeopleAdmin Action:**

#### **I. Position Information**

**OUC:** 242240 - University Housing - West Campus

**Position Number:** 00099999

**Endorsed Classification Title:** University Program Associate

**Endorsed Career-band Level:** Journey

**New Job Code:** 10300

*\*Note: If entering the Job Code into PeopleSoft as a result of an endorsed reclassification action, PeopleSoft may require this code to end in an "N" or "E". If so, please select accordingly based on the FLSA Status noted below.*

**FLSA Status:** Non-Exempt

**FTE:** 1.00

**Time Limited:** No

**Appointment Duration:** 12 Month Recurring

#### **II. Personnel Action Information**

**Type of SPA Action:** Reclassification

#### **III. Status**

**Date Approved:** 01/12/2015

**HR Consultant:** Mr. Wolfpack

### **PeopleSoft Action Instructions:**

Go to Organizational Development> Add/Update positions> insert a new row> enter the effective date> select Reason: Reclass SPA Higher Journey Reference Rate> Change the job code> Enter the Step/Level (1=Contributing, 2=Journey, 3=Advanced)> Save the action.

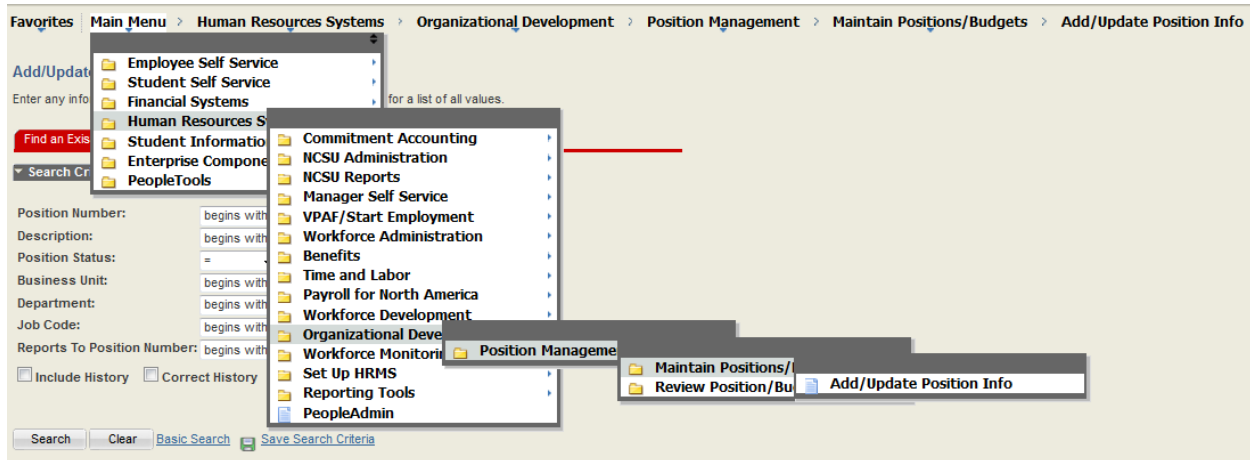
\*Please ensure the appropriate Level (or Step) is indicated on the incumbent at the time of hire in the HR System.

You will also receive a confirmation email from our office at the time the job advertisement is posted and accessible to applicants. The following link directs you to resources from NC State's Onboarding Center on creating a positive new employee experience and on preparing for your new employee: <https://onboarding.ncsu.edu/creating-a-positive-new-employee-experience/>.

## Processing a Position Change on a Vacant Position

### Position Data (Vacant position)

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 the **Search** button.

The screenshot shows the 'Add/Update Position Info' screen. The title is 'Add/Update Position Info'. Below the title is a instruction: '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 the tabs is a 'Search Criteria' section. The search criteria fields are: Position Number: begins with 00099999; Description: begins with; Position Status: =; Business Unit: begins with; Department: begins with; Job Code: begins with; Reports To Position Number: begins with. There are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom 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.

Position Information

Position Number: 00099999

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

\*Effective Date: 07/01/2013 \*Status: Active PAF

\*Reason: OCU Change OUC/Dept Action Date: 06/07/2013

\*Position Status: Approved Status Date: 01/01/1901

☐ Position Flagged Flagged Position Reason: None Selected Recurring/Contract Length: 12 Month

☐ Time Limited (SPA) Mandatory/Essential/Key \*Empl Class: SPA SPA Employee

Job Information

JCAT: 540X00 Administrative / Office / Clerical Support Staff

\*Job Code: 10421 Administrative Support Assoc

\*Regular Shift: N/A

\*Title: Administrative Support Assoc Short Title: AdminSup Detailed Position Description

Work Location

\*Department: 242240 Univ Housing-West Campus

\*Location: 243 University Housing-West

Reports To: 00004271 Asst Director

Salary Plan Information

Salary Admin Plan: ADM Grade: 01 Step: 2


Standard Hours: 40.00 Work Period: W Weekly

Shared Position FTE: 0.000000

U S A

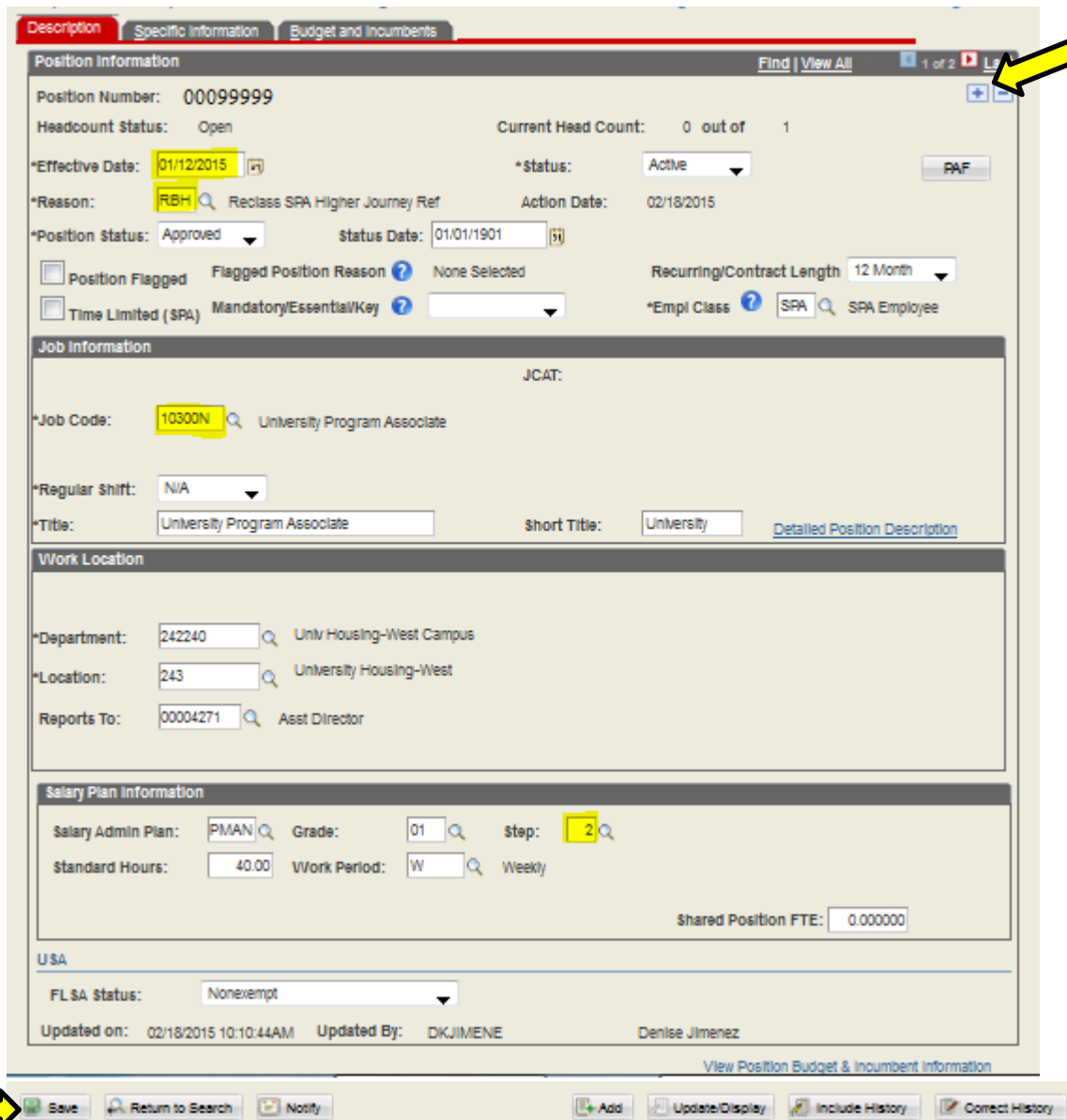
FL SA Status: Nonexempt

Updated on: 06/07/2013 5:39:37PM Updated By: RSOIFER Richard Solter



[View Position Budget & Incumbent Information](#)

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. The form is divided into several sections: Position Information, Job Information, Work Location, Salary Plan Information, and U.S.A. The Position Information section includes fields for Position Number (00099999), Headcount Status (Open), Current Head Count (0 out of 1), Effective Date (01/12/2015), Status (Active), Reason (RSH), Action Date (02/18/2015), Position Status (Approved), Status Date (01/01/1901), Position Flagged, Flagged Position Reason (None Selected), Recurring/Contract Length (12 Month), Time Limited (SPA), Mandatory/Essential/Key, and Empl Class (SPA). The Job Information section includes Job Code (10300N), Regular Shift (N/A), Title (University Program Associate), and Short Title (University). The Work Location section includes Department (242240), Location (243), and Reports To (00004271). The Salary Plan Information section includes Salary Admin Plan (PMAN), Grade (01), Step (2), Standard Hours (40.00), Work Period (W), and Shared Position FTE (0.000000). The U.S.A. section includes FL SA Status (Nonexempt). The form is updated on 02/18/2015 10:10:44AM by DKJIMENE. A yellow arrow points to the plus sign in the top right corner of the Position Information section, and another yellow arrow points to the Save button at the bottom left.

The position updates will automatically transition to job data when an incumbent is hired into the position.

# Processing a Position Change on a Filled Position

## Sample of Position Change Approval Email

This email serves as confirmation that review of PeopleAdmin action #AC150822SP is complete. As requested, position #00099999, Larry Wolfpack, is endorsed for level change from Business & Technology Applications Specialist -Journey to the Advanced level.

Please note that the position remains Exempt from the provisions of the Fair Labor Standards Act (FLSA); therefore, incumbents of this position are neither required to maintain a time sheet, nor eligible for overtime compensation (or comp time).

Please ensure a PeopleSoft action is entered effective 03/01/2015. For your reference, a detailed summary of the salary change is included below, along with instructions for entering the PeopleSoft action.

### Summary of Endorsed PeopleAdmin Action:

#### I. Incumbent Information

**Name:** Larry Wolfpack

**Empl ID:** 000123456

**Action Number:** AC150822SP

**Working Title:** Business & Technology Applications Specialist

#### II. Position Information

**OUC:** 515001 - Enterprise Application Svcs

**Position Number:** 00012345

**Endorsed Classification Title:** Business & Technology Applications Specialist

**Endorsed New Career-band Level:** Advanced

**Job Code:** 12259

*\*Note: If entering the Job Code into PeopleSoft as a result of an endorsed reclassification action, PeopleSoft may require this code to end in an "N" or "E". If so, please select accordingly based on the FLSA Status noted below.*

**FLSA Status:** Exempt

**FTE:** 1.00

**Time Limited:** No

**Appointment Duration:** 12 Month Recurring

#### III. Personnel Action Information

**Type of SPA Action:** Level Change, Existing Position Entry

**Type of Salary Action:** Within Band (Change in Level)

**Current salary:** \$91,000

**Endorsed Increase- dollar amount:** \$9,000

**Endorsed Increase - percentage:** 9.9%

**Endorsed New Salary:** \$100,000

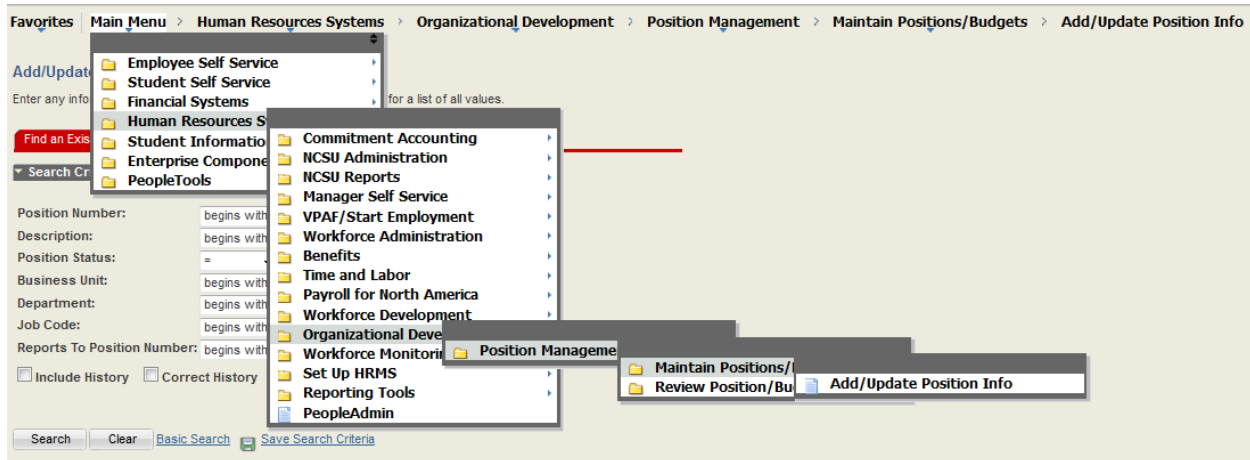
**Effective Date:** 03/01/2015

#### IV. Status

**Date Approved:** 03/10/2015

## Position Data (Filled position)

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.

### 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**

**Search Criteria**

Position Number: begins with 00099999

Description: begins with

Position Status: =

Business Unit: begins with

Department: begins with

Job Code: begins with

Reports To Position Number: begins with

☐ Include History ☐ Correct History ☐ Case Sensitive

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



The most current action will appear on the position when the screen first appears.

Description

Specific Information

Budget and Incumbents

Position Information

Find | View All | First 2 of 11 | Last

Position Number: 00099999

Headcount Status: Filled

Current Head Count: 1 out of 1

\*Effective Date: 12/04/2013

\*Status: Active

PAF

\*Reason: RTC Change Reports To Assignment

Action Date: 12/04/2013

\*Position Status: Approved

Status Date: 01/01/1901

☐ Position Flagged

Flagged Position Reason

None Selected

Recurring/Contract Length: 12 Month

☐ Time Limited (SPA) Mandatory/Essential/Key

\*Empl Class: SPA SPA Employee

Job Information

JCAT: 461X13

IT Applications Professional, Programmer Analyst Sr.

\*Job Code: 12259

Bus & Tech App Specialist

\*Regular Shift: N/A

\*Title: Bus & Tech App Specialist

Short Title: B&T ASpec

[Detailed Position Description](#)

Work Location

\*Department: 515001

Enterprise Application Svcs

\*Location: 394

Enterprise Application Svcs

Reports To: 00100017

Information Technology Mgr

Salary Plan Information

Salary Admin Plan: BTS

Grade: 03

Step: 2

Standard Hours: 40.00

Work Period: W Weekly

Shared Position FTE: 0.000000

USA

FLSA Status: Exempt

Updated on: 12/04/2013 1:55:38PM

Updated By: DKJIMENE

Denise Jimenez

[View Position Budget & Incumbent Information](#)

Save

Return to Search

Notify

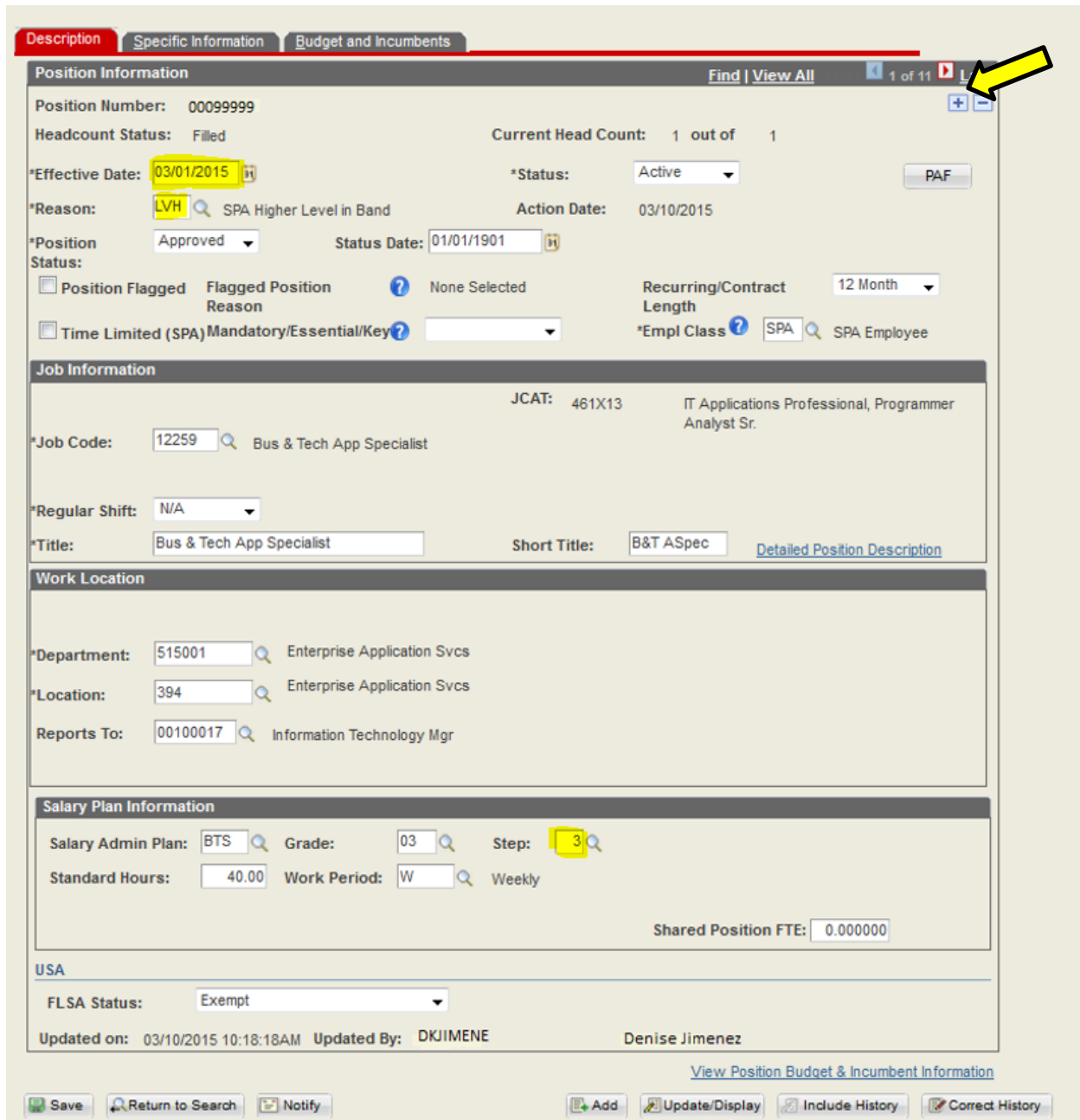
Add

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.



The screenshot displays the 'Position Information' form within a web application. The form is organized 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, indicating where to click to add a new row. The form contains various input fields and dropdown menus, some of which are highlighted in yellow. The 'Effective Date' is set to 03/01/2015, and the 'Status' is set to Active. The 'Reason' is set to LVH, and the 'Action Date' is 03/10/2015. The 'Position Status' is set to Approved, and the 'Status Date' is 01/01/1901. The 'Job Information' section shows the 'Job Code' as 12259, 'Regular Shift' as N/A, and 'Title' as Bus & Tech App Specialist. The 'Work Location' section shows the 'Department' as 515001, 'Location' as 394, and 'Reports To' as 00100017. The 'Salary Plan Information' section shows the 'Salary Admin Plan' as BTS, 'Grade' as 03, 'Step' as 3, 'Standard Hours' as 40.00, 'Work Period' as W, and 'Weekly' as the frequency. The 'USA' section shows the 'FLSA Status' as Exempt. The form is updated on 03/10/2015 10:18:18AM by DKJIMENE and Denise Jimenez. At the bottom, there are buttons for Save, Return to Search, Notify, Add, Update/Display, Include History, and Correct History.

**Position Information** Find | View All 1 of 11

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

\*Effective Date: 03/01/2015 \*Status: Active PAF  
\*Reason: LVH SPA Higher Level in Band Action Date: 03/10/2015  
\*Position Status: Approved Status Date: 01/01/1901  
☐ Position Flagged Flagged Position Reason ? None Selected Recurring/Contract Length 12 Month  
☐ Time Limited (SPA) Mandatory/Essential/Key ? \*Empl Class ? SPA SPA Employee

**Job Information**

JCAT: 461X13 IT Applications Professional, Programmer Analyst Sr.  
\*Job Code: 12259 Bus & Tech App Specialist  
\*Regular Shift: N/A  
\*Title: Bus & Tech App Specialist Short Title: B&T ASpec [Detailed Position Description](#)

**Work Location**

\*Department: 515001 Enterprise Application Svcs  
\*Location: 394 Enterprise Application Svcs  
Reports To: 00100017 Information Technology Mgr

**Salary Plan Information**

Salary Admin Plan: BTS Grade: 03 Step: 3  
Standard Hours: 40.00 Work Period: W Weekly  
Shared Position FTE: 0.000000

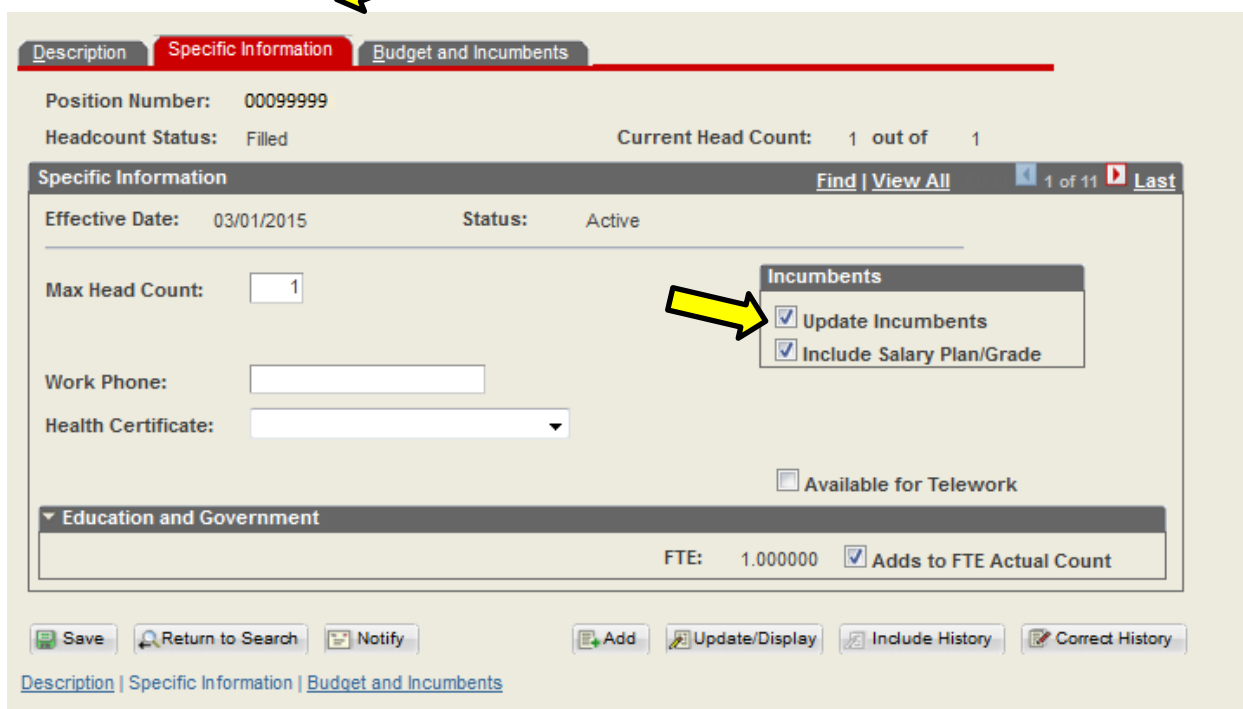
**USA**

FLSA Status: Exempt  
Updated on: 03/10/2015 10:18:18AM Updated By: DKJIMENE Denise Jimenez

[View Position Budget & Incumbent Information](#)

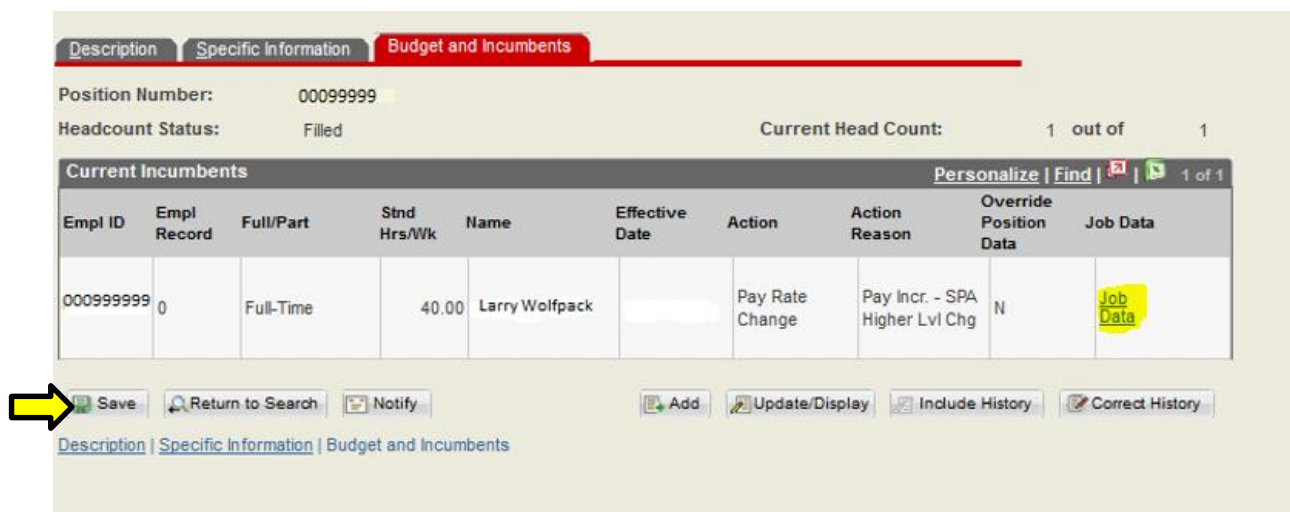
Save Return to Search Notify Add Update/Display Include History Correct History

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.



The screenshot shows the 'Specific Information' tab for Position Number 00099999. The 'Incumbents' section is expanded, showing two checked options: 'Update Incumbents' and 'Include Salary Plan/Grade'. A yellow arrow points to these options. Other fields include 'Effective Date: 03/01/2015', 'Status: Active', 'Max Head Count: 1', 'Work Phone', 'Health Certificate', and 'FTE: 1.000000'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

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.



The screenshot shows the 'Budget and Incumbents' tab. It displays a table of 'Current Incumbents' with columns: Empl ID, Empl Record, Full/Part, Std Hrs/Wk, Name, Effective Date, Action, Action Reason, Override Position Data, and Job Data. The table contains one entry for Larry Wolfpack with Empl ID 000999999 and Empl Record 0. A yellow arrow points to the 'Save' button at the bottom left. The 'Job Data' link in the table is highlighted in yellow.

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	Larry Wolfpack		Pay Rate Change	Pay Incr. - SPA Higher Lvl Chg	N	<a href="#">Job Data</a>

**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 and searching for the employee. *Navigation: Main Menu->HR Systems->Workforce Administration->Job Information->Job Data*

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

Larry Wolfpack  
Employee

Empl ID: 00099999  
Empl Record: 0

Work Location

Find First 2 of 2

\*Effective Date: 03/01/2015

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

\*Action: Position Change

\*Reason: SPA Higher Level in Band

\*Job Indicator: Primary Job

Position Number: 00099999 Bus & Tech App Specialist

Position Entry Date: 11/12/2012

Regulatory Region: USA United States

Company: NCS NC State University

Business Unit: NCSU1 NC State Univ Business Unit

Department: 515001 Enterprise Application Svcs

Department Entry Date: 08/01/2011

Location: 394 Enterprise Application Svcs

Establishment ID: 001 NC State University

Last Start Date: 01/14/2002

Expected Job End Date:

Date Created: 03/10/2015

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Distribution Set Up

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

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

The example above reflects the position update. Click on the “**Salary Plan**” tab below to verify the Step Change.

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

Larry Wolfpack  
Employee

Empl ID: 00099999  
Empl Record: 0

Salary Plan

Find | View All First 2 of 2

Effective Date: 03/01/2015

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

Action: Position Change

Reason: SPA Higher Level in Band

Job Indicator: Primary Job

Salary Admin Plan: BTS

Grade: 03

Step: 3

Grade Entry Date: 11/12/2012

Step Entry Date: 03/01/2015

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation | Distribution Set Up

Save | Return to Search | Notify | Refresh | Update/Display | Include History | Correct History

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

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

To begin this action select the **“Work Location”** tab and click the plus sign (+) at 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 change 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.

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

Larry Wolfpack  
Employee

Empl ID: 000999999  
Empl Record: 0

**Work Location** Find 1 of 2

\*Effective Date: 03/01/2015 PAF Go To Row +

Effective Sequence: 1 \*Action: Pay Rate Change

HR Status: Active \*Reason: Pay Incr. - SPA Higher Lvl Chg

Payroll Status: Active \*Job Indicator: Primary Job

Position Number: 00099999 Bus & Tech App Specialist  
Override Position Data

Position Entry Date: 11/12/2012  
☐ Position Management Record

Regulatory Region: USA United States  
Company: NCS NC State University  
Business Unit: NCSU1 NC State Univ Business Unit  
Department: 515001 Enterprise Application Svcs  
Department Entry Date: 08/01/2011  
Location: 394 Enterprise Application Svcs  
Establishment ID: 001 NC State University Date Created: 03/10/2015

Last Start Date: 01/14/2002  
Expected Job End Date:  ☐ End Job Automatically

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

[Save](#) [Return to Search](#) [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 Larry Wolfpack. The **Compensation** tab is selected, and the **Compensation Rate** is highlighted in red, showing a value of 100,000.00. The **Pay Components** table below it also shows the same rate. The **Calculate Compensation** button is highlighted in yellow. The **Save** button is also highlighted with a yellow arrow.

*Rate Code	Help Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 BASE		0	100,000.000000	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.