

# Position Maintenance:

- General rules
- Changing the Position Labor Distribution
- Changing a Single position to Pooled
- Recycling a Vacant Position to a New Position Class

# General rules

# Position Maintenance

## Who is responsible for position maintenance?

**Central HR Offices** are responsible for the maintenance of the following positions:

- Permanent/status Civil Service positions
- Extra Help Clerical positions
- Undergraduate Student positions

**Units** are responsible for the maintenance of the following positions:

- Faculty and Other Academic
- Academic Professional
- Unpaid
- Grad Assistants
- Hourly (Academic and Grad)
- Extra Help non-clerical (Professional, Technical and General Service)

# When to Recycle an Existing Position

An existing **vacant** position should be reused when:

(a) a position has the same p-class, title, descriptors, etc. for the new job (a straight replacement)

or

(b) modifications are made in the position form (NBAPOSN) to reflect a different p-class, title, updated PAPE and coding changes, etc.

## **Remember:**

positions must remain the same pay ID (ex: position was paid monthly, so reused position must be paid monthly)

and

modification of faculty and other academic positions require coding changes on NBAPOSN (descriptors, area of discipline, etc.)

# When do I create a new Position?

If you need a.....

- Faculty and Other Academic
- Academic Professional
- Unpaid
- Grad Assistants
- Hourly (Academic and Grad)
- Extra Help non-clerical (Professional, Technical and General Service)

.....and you do not have a position in one of the above categories to re-use or recycle

# When and why will I do Position Labor Distribution change?

- when it is a long term change in funding

# Position Labor Distribution Change - Overview of Steps

1. Determine the Position and enter the position number
2. Populate the NBAPOSN form by clicking on the “next block” icon on the tool bar.
3. Click Options on the menu-select Position Labor Distribution
4. Revise the Position Labor Distribution-- this is where the Unit will update the position FOAP information
5. Save

# Step 1. Determine the Position and enter the position number

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Help Window

Position Definition NBAPOSN 6.0.1.1 (BANPROD) (1UIUC)

Position Number:

Enter the position number

Position Status:  Type:   
Position Begin Date:  Position End Date:  COA:

Compensation/Classification Information

Position Class:  Appointment %:   
Position Title:  Exempt Indicator:   
Employee Class:  Accrue Seniority:

Job Progression:

Salary Group:  Range Low:   
Salary Table:  Range Midpoint:   
Salary Grade:  Range High:   
Salary Step:  Step Value:

Salary Group Desc:   
Reports To:

Work Schedule:   
Probationary Period:  Job Location:   
Bargaining Unit:

Step 2. Populate the NBAPOSN form by clicking on the “next block” icon on the tool bar

Next block icon

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Help Window

Position Definition NBAPOSN 6.0.1.1 (BANPROD) (1UIUC)

Position Number: U00030

Position Status: Active Type: Pooled

Position Begin Date: 01-FEB-2004 Position End Date: COA: 1

Compensation/Classification Information

Position Class: CASHA ASTFE 9MO GRDAP TEACH Appointment %: 100.00

Position Title: Grad Teaching Assistant Exempt Indicator:

Employee Class: GA Graduate Assistants Accrue Seniority:

Job Progression:

Salary Group: 2006 Range Low: 1.00

Salary Table: VB Range Midpoint: 1.00

Salary Grade: UNDFD Range High: 99999.00

Salary Step: 0 Step Value:

Salary Group Desc: Grad/Pst Dc Res/Rsdnts/Intrns

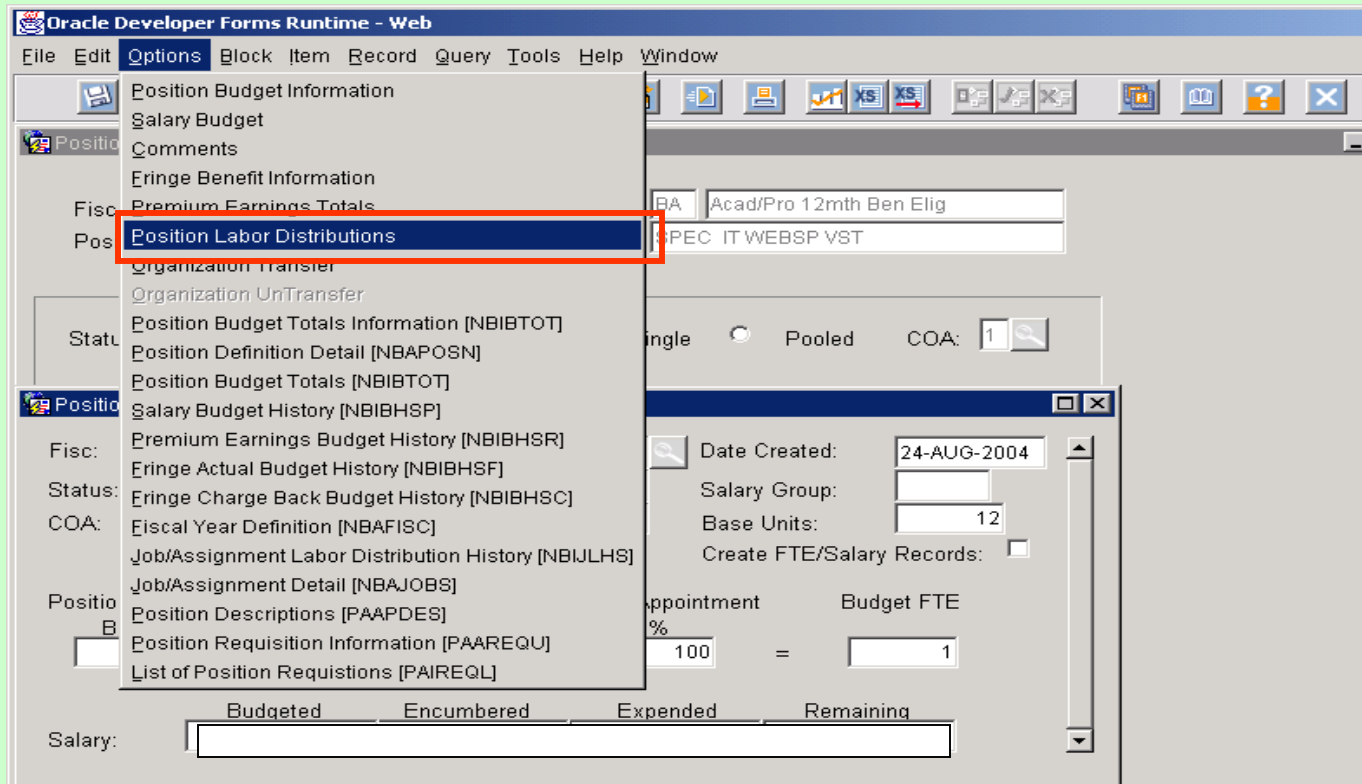
Reports To:

Work Schedule:

Probationary Period: Job Location:

Bargaining Unit: GA U-Graduate Employee Union

## Step 3. Options-select Position Labor Distribution



## Step 4. Revise the Position Labor Distribution-- this is where the Unit will update the position FOAP information

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Help Window

Position Budget NBAPBUD 6.0.0.1 (BANPROD) (1UIUC)

Fiscal Year: 2004 Employee Class: CA CS 75Hr/pay N/E Ben Elig  
Position No: U82568 Position Title: PLC TELECOM (LU)

Position Labor Distribution NBAPBUD 6.0.0.1 (BANPROD) (1UIUC)

Fisc: 2004 Orgn: 664000 FTE: 1  
Status: Approved Budget ID: H2004 Date Created: 01-JUL-2003  
COA: 1 Phase: HLAB04 Salary Group:

Salary: Budgeted Encumbered Expended Remaining

N	Index	Fund	Orgn	Acct	Prog	Salary Budget	Percent
<input type="checkbox"/>		100004	664000	213300	664001	.00	100.00
<input type="checkbox"/>							
Totals:						.00	100.00

- Tab to the Percent field in the FOAPAL line(s) to be removed/changed and enter "0" or new Percent
- If additional FOAPs are needed, click in the next row or line; enter the "new" Fund, Org, Account, Program (FOAP) lines codes and Percent.  
(ex: If splitting from one FOAP to two or more FOAPS (such as 60/40 or 33/33/34, etc.), enter additional FOAP and Percent lines. Remember Total Percent must equal 100.00)

**Step 5. Save the record**

# When and why will I recycle a vacant position to change it from single to pooled?

- to conserve position numbers
- done only when the new position class is approved for being pooled (see list)

## Employee Classes that use “pooled” positions

- Academic Hourly
- Grad Hourly
- Fellowship
- Student
  - Federal Work Study
  - Non-Federal Work Study

- Extra Help
  - Non-clerical (general services, technical, professional)
  - Clerical
- **Grad Assistant** (pooled by Title, such as Teaching Associate-Math; Grad Assistants that Tutor)
- **Unpaid** – pooled by pclass

# Recycling a vacant position to a different position type single vs. pooled

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Help Window

Position Definition NBAPOSN 6.0.1.1 (BANPROD) (1UIUC)

Position Number: U00011

Position Status: Active Type: Pooled

Position Begin Date: 02-FEB-2004 Position End Date: COA: 1

Compensation/Classification Information

Position Class: CFSAA ASTFE HRLY GRDAP Appointment %: 100.00

Position Title: Grad Hourly Exempt Indicator:

Employee Class: HA Academic/Grad Hourly Accrue Seniority:

Job Progression:

Under the Position Number, you see the position status and type. If a position is “single” this means one position to one job and a “pooled” position means one position to many jobs. For example, an Accountant I position has one job. A Grad Hourly position has several jobs under the same position number. The field used to maintain the type of position is on NBAPBUD.

# Position Type

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Help Window

Position Budget NBAPBUD 6.1 (BANPROD) (1UIUC)

Fiscal Year: 2005 Employee Class: HA Academic/Grad Hourly  
Position No: U00011 Position Title: Grad Hourly

Status: Active Type:  Single  Pooled COA: 1

Budget Profile:

Position Effective Dates Budget Roll Rules  
Begin Date: 02-FEB-2004 Salary: Current Salary  
End Date: Premium Earnings: Not Applicable

Budget Authorization  
Authorized By:

NBAPBUD: The Position Type can be either “single” or “pooled”. Banner’s default is set to the “single” type. In this example, to change the type from single to pooled, tab to the radio button next to “Pooled” or **click on it**. If the Budget Profile does not need to be revised, **Save** the record and now this is a pooled position.

## Employee Classes that **do not** use “pooled” positions

- Academic Professional
- Civil Service (permanent)
- Faculty
- Other Academics

# Recycling a Position

Using a New Position class

# When and why will I recycle a vacant position to a different position class?

- to conserve position numbers
- done only when the new position class is the same Pay ID (example: was Monthly, new p-class is Monthly)
- Example: Position was a Research Specialist and now is being recycled to a Clinical Psychologist. Both are on the MN payID. You **can** do this.
- Example: Position was an Ac Hourly (BW payID) and you are trying to recycle to an Ac Professional (MN payID). You **cannot** do this because of different payIDs.

# Recycling a Position - Overview of Steps

1. Determine the vacant Position to be used and enter the position number on the NBAPOSN form
2. Click on P-class field, highlight and type in the new code
3. Click on Position Title oertype if need a working title (ex: ASSOC PROF, COORD, SPECIAL PROGRAMS, etc.)
4. Change E-class; if applicable
5. Save
6. Click Options on menu bar-select NBAPBUD
7. Revise the NBAPBUD information (ex: Type or Budget Profile); Save the record
8. Revise Salary Budget information; Save the record
9. Click Options-select Position Labor Distribution
10. Revise FOAPAL information; Save the record

# Recycling a Position - Overview of Steps (continued)

11. Go back to the main NBAPOSN screen - Click Options - select Position Descriptors; update and then Save the record
12. Click Options from the NBAPOSN screen again-select Regulatory Information
  - a) If changing to an Academic Professional p-class, enter PAPE number in the National Occupational Code field, Save the record
  - b) If faculty, enter the Area of Discipline in the CIPC field, Save the record

Maintenance of the Position when changing the position class is now complete.

# Step 1. Determine the vacant Position to be used and enter the position number

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Help Window

Position Definition NBAPOSN 6.0.1.1 (BANPROD) (1UIUC)

Position Number: U00030

Enter the position number

Position Status:  Type:   
Position Begin Date:  Position End Date:  COA:

Compensation/Classification Information

Position Class:  Appointment %:   
Position Title:  Exempt Indicator:   
Employee Class:  Accrue Seniority:

Job Progression:

Salary Group:  Range Low:   
Salary Table:  Range Midpoint:   
Salary Grade:  Range High:   
Salary Step:  Step Value:

Salary Group Desc:   
Reports To:

Work Schedule:   
Probationary Period:  Job Location:   
Bargaining Unit:

Populate the NBAPOSN form by clicking on the “next block” icon on the tool bar

Next block icon

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Help Window

Position Definition NBAPOSN 6.0.1.1 (BANPROD) (1UIUC)

Position Number: U00030

Position Status: Active Type: Pooled

Position Begin Date: 01-FEB-2004 Position End Date: COA: 1

Compensation/Classification Information

Position Class: CASHA ASTFE 9MO GRDAP TEACH Appointment %: 100.00

Position Title: Grad Teaching Assistant Exempt Indicator:

Employee Class: GA Graduate Assistants Accrue Seniority:

Job Progression:

Salary Group: 2006 Range Low: 1.00

Salary Table: VB Range Midpoint: 1.00

Salary Grade: UNDFD Range High: 99999.00

Salary Step: 0 Step Value:

Salary Group Desc: Grad/Pst Dc Res/Rsdnts/Intns

Reports To:

Work Schedule:

Probationary Period: Job Location:

Bargaining Unit: GA U-Graduate Employee Union

Step 2. Update the Position Class Code

Step 3. If necessary, overwrite Position Title with the working title

(ex: ASSOC PROF, COORD, SPECIAL PROGRAMS, etc.)

3a. Enter new P-Class code

on NBAPOSN 6.0.1.1 (BANPROD) (1UIUC)

Position Number: U00030

Position Status: Active Type: Single

Position Begin Date: 01-FEB-2004 Position End Date: COA: 1

Compensation/Classification Information

Position Class: CASHA ASTFE 9MO GRDAP TEACH Appointment %: 100.00

Position Title: Grad Teaching Assistant Exempt Indicator:

Employee Class: GA Graduate Assistants Accrue Seniority:

Job Progression:

Salary Group: 2005 Range Low: 1.00

Salary Table: VB Range Midpoint: 1.00

Salary Grade: UNDFD Range High: 99999.00

Salary Step: 0 Step Value:

Salary Group Desc: Grad/Pst Dc Res/Rsdnts/Intrns

Reports To:

Work Schedule:

Probationary Period: Job Location:

Bargaining Unit: GA U-Graduate Employee Union

3b. Overtyping position title with the correct working title

## Step 4. Change the E-class, if needed

Double check the defaults to make sure they are correct

4. Change the E-class, if needed

Definition NBAPOSN 6.0.1.1 (BANPROD) (1UIUC)

Position Number: U00030

Status: Active Type: Single

Begin Date: 01-FEB-2004 Position End Date: COA: 1

Compensation/Classification Information

Position Class: CASHA ASTFE 9MO GRDAP TEACH Appointment %: 100.00

Position Title: Grad Teaching Assistant Exempt Indicator:

Employee Class: GA Graduate Assistants Accrue Seniority:

Job Progression:

Salary Group: 2005 Range Low: 1.00

Salary Table: VB Range Midpoint: 1.00

Salary Grade: UNDFD Range High: 99999.00

Salary Step: 0 Step Value:

Salary Group Desc: Grad/Pst Dc Res/Rsdnts/Intrns

Reports To:

Work Schedule:

Probationary Period: Job Location:

Bargaining Unit: GA U-Graduate Employee Union

4a. Double check the defaults to make sure they are correct (sometimes all values in box are automatically filled in but sometimes not)

Step 5. Save the record

# Step 6. The Options menu is used to access other Position-related forms- select Position Budget (NBAPBUD)

The screenshot shows the Oracle Developer Forms Runtime - Web interface. The 'Options' menu is open, and 'Position Budget (NBAPBUD)' is highlighted with a red box and a red arrow. The background form is partially visible, showing fields for 'Single', 'COA: 1', 'Appointment %: 100.00', 'Exempt Indicator: [checked]', 'Accrue Seniority: [unchecked]', 'Range Low: 1.00', 'Range Midpoint: 1.00', and 'Range High: 99999.00'. A text box on the right contains the instruction: 'After Position Definition form (NBAPOSN) is revised; go to Options, select Position Budget (NBAPBUD)'.

Step 7. NBAPBUD-Enter revised Position Budget Information  
Enter Fiscal Year and then “next block” and the form populates

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Help Window

Position Budget NBAPBUD 6.1 (BANPROD) (1UIUC)

Fiscal Year: 2005 Employee Class: BA Acad/Pro 12mth Ben Elig  
Position No: U00119 Position Title: SPEC IT WEBSP VST

Status: Active Type:  Single  Pooled COA: 1

Budget Profile: R Recurring

Position Effective Dates Budget Roll Rules

Begin Date: 16-MAY-2004 Salary: Current Salary  
End Date: Premium Earnings: Not Applicable

Budget Authorization  
Authorized By:

The two fields updated on this general form are the Budget Profile and Position Type (Single or Pooled)

Step 7. (continued) List of Values for Budget Profile Codes on NBAPBUD-displays by double-clicking in field next to **blue text**, select one profile code, click “ok” and then save the record

Oracle Developer Forms Runtime - Web

File Edit Options Block Item Record Query Tools Help Window

Position Budget NBAPBUD 6.1 (BANPROD) (1UIUC)

Fiscal Year: 2005 Employee Class: GA Graduate Assistants  
Position No: U00015 Position Title: GRAD RES ASST

Status: Active

**Budget Profile:**

Position Effective Dates  
Begin Date: 02-JAN-2004  
End Date:

Budget Profile (NTVBPRO)

Find %

Code	Description
B	Grant
BO	Open Range - Grant
M	Multi
N	Non-Recurring
NO	Open Range - Non-Recurring
R	Recurring
RO	Open Range - Recurring
X	Not Budgeted

Find OK Cancel

**Units will only be using B, N, R or X for positions they maintain.**

# Step 8. Click Next Block to move to the Salary Budget or Click Options-select Salary Budget

The screenshot shows the Oracle Developer Forms Runtime - Web interface. The 'Options' menu is open, and 'Salary Budget' is highlighted with a red box. The main form area displays the following information:

- Position Budget Information: BA Acad/Pro 12mth Ben Elig
- Position: SPEC IT WEBS VST
- Single  Pooled  COA: 1
- Budget Roll Rules: Salary: Current Salary, Premium Earnings: Not Applicable
- Budget Authorization: Authorized By: [ ]
- Begin Date: 16-MAY-2004
- End Date: [ ]

## Step 8. Revise the Position Salary Budget Information

Position Budget NBAPBUD 6.1 (BANPROD) (1UIUC)

Fiscal Year: 2005 Employee Class: BA Acad/Pro 12mth Ben Elig  
Position No: U00119 Position Title: SPEC IT WEBSVP VST

Status: Active Type: Single Pooled COA: 1

Position Salary Budgets NBAPBUD 6.1 (BANPROD) (1UIUC)

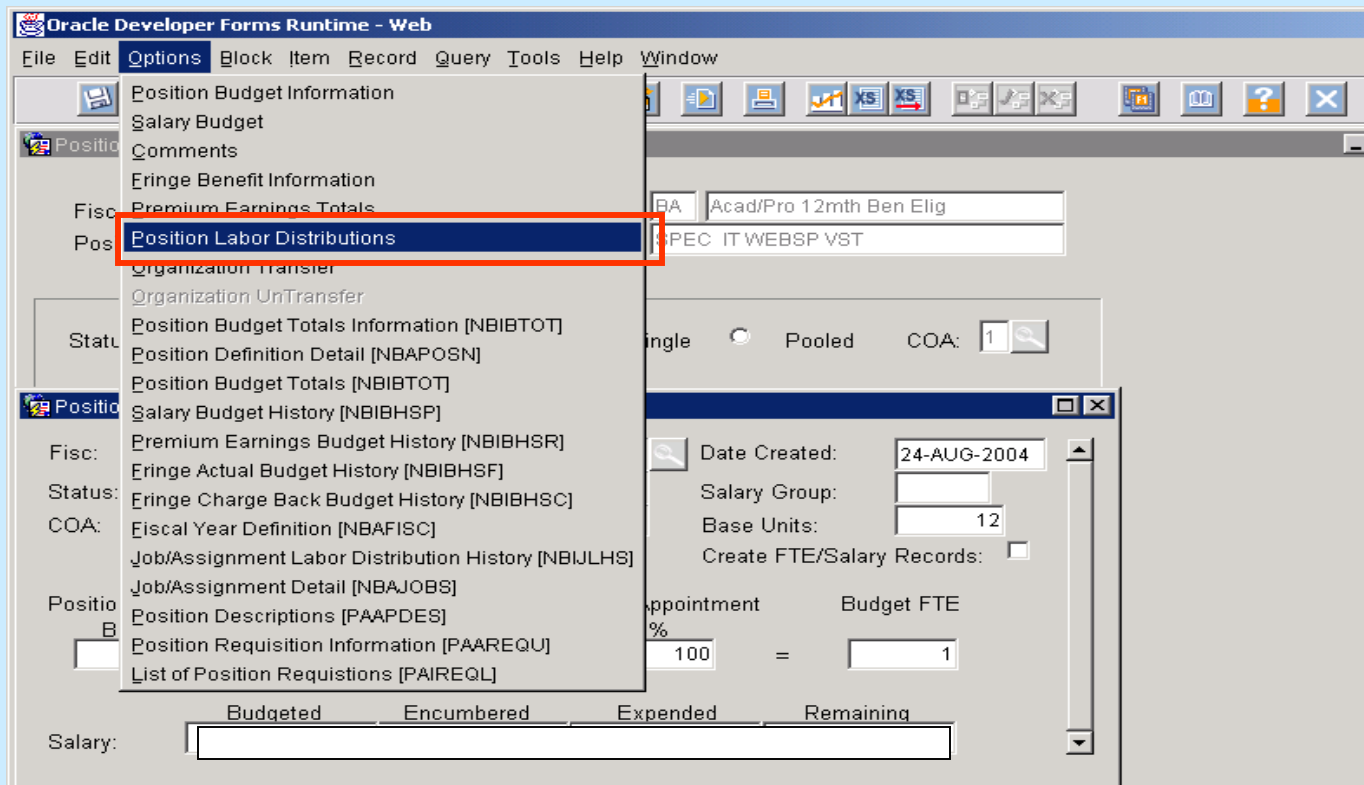
Fisc: 2005 Orgn: 051000 Date Created: 24-AUG-2004  
Status: Approved Budget ID: H2005 Salary Group:  
COA: 1 Phase: HLAB05 Base Units: 12  
Create FTE/Salary Records:

Position Budget Basis: 12 / Position Annual Basis: 12 \* Budget Appointment %: 100 = Budget FTE: 1

Salary: Budgeted Encumbered Expended Remaining

- Make sure the **Fiscal Year** is **current** (ex: in the 2005-06 FY, enter 2006)
- **Status** will default as **Approved** (do not change)
- **COA** defaults in from the main PBUD screen
- **Orgn** code may need to be entered
- Budget ID and Phase reflect **same as Fiscal Year** (H2006 & HLAB06)
- Date Created should be the same as the Position Begin Date on main PBUD form
- Salary Group stays **blank**
- Base Units is to be **12** (monthly) or **26** (bi-weekly)
- Budget Appointment % is **100**
- Budgeted FTE is **1.0**
- Budgeted Salary (amount) is **zero**
- **Save** the record

## Step 9. Click Options-select Position Labor Distribution



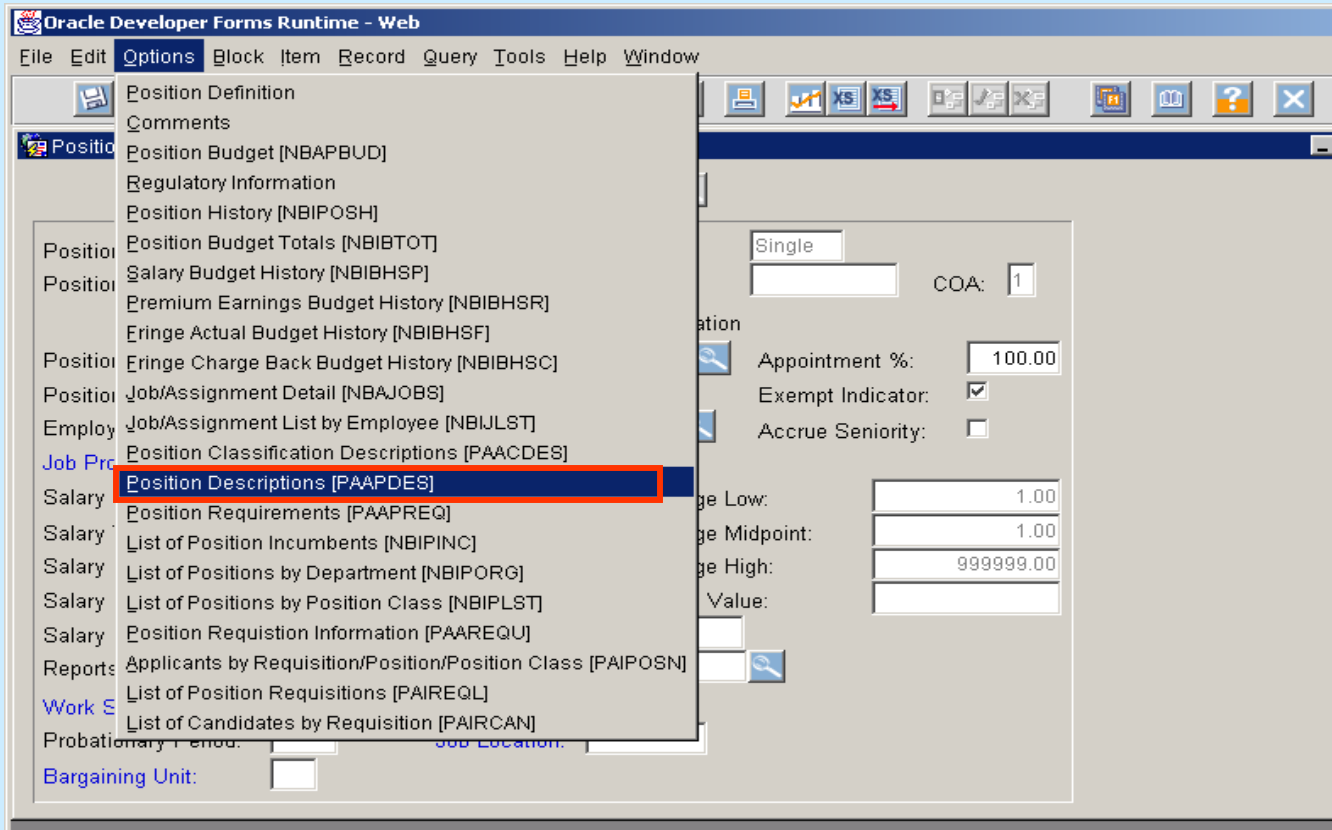
## Step 10. Revise the Position Labor Distribution-- this is where the Unit will update the position FOAP information

The screenshot displays the Oracle Developer Forms Runtime - Web interface. The main window is titled "Position Labor Distribution NBAPBUD 6.0.0.1 (BANPROD) (1UIUC)". It contains several input fields and a table. The top section includes fields for Fiscal Year (2004), Employee Class (CA CS 75Hr/pay N/E Ben Elig), Position No. (U82568), and Position Title (PLC TELECOM (LU)). Below this, there are fields for Fisc. (2004), Status (Approved), COA (1), Orgn. (664000), Budget ID (H2004), Phase (HLAB04), FTE (1), Date Created (01-JUL-2003), and Salary Group. A section for Salary includes Budgeted, Encumbered, Expended, and Remaining fields. The main table has columns for N, Index, Fund, Orgn, Acct, Prog, Salary Budget, and Percent. The first row is highlighted with Fund 100004, Orgn 664000, Acct 213300, Prog 664001, Salary Budget .00, and Percent 100.00. A Totals row shows Salary Budget .00 and Percent 100.00.

N	Index	Fund	Orgn	Acct	Prog	Salary Budget	Percent
		100004	664000	213300	664001	.00	100.00
Totals:						.00	100.00

1. Tab to the Percent field in the FOAPAL line(s) to be removed/changed and enter "0" or new Percent
2. If additional FOAPs need to be added, click in the next row or line; enter the "new Fund, Org, Account, Program (FOAP) lines codes and Percent.  
(ex: If splitting from one FOAP to two or more FOAPS (such as 60/40 or 33/33/34, etc.), enter additional FOAP and Percent lines. Remember Total Percent must equal 100.00)
3. Save record

# Step 11. Go back to the main NBAPOSN screen - Click Options -select Position Descriptions



## Step 11. Adding Position Descriptors for Grad Assistant, Academic Professional and Faculty positions

Oracle Developer Forms Runtime - Web

Window

Position: 8U0987 Grad Res Asst

Position Class: CASGA ASTFE 9MO GRDAP RSRCH

Use Default Position Classification Descriptions for this Position?

Code	Description	Activity Date
		25-FEB-2004

Option List

- Position Class Descript (PTVCDES)
- Position Classification (PAACDES)

Cancel

If code is known, enter the code(s) in the blank **Code** field and Save.

or

Double-click in the **Code** field then choose **Position Class Descript (PTVCDES)**



## Step 11. List of Position Descriptors for Grad Assistant and Grad Research Assistant positions (continued)

- GA001 Clerical Support
- GA002 Technical/Support Services
- GA003 Advising
- GA004 Outreach Duties
- GP001 Internship/Pre-Professional
- GR001 Conducting Experiments
- GR002 Organizing or Analyzing Data
- GR003 Presenting Findings in a Publication or Dissertation
- GR004 Collaborating with Faculty in Preparing Publications
- GR005 Overseeing Work of other RAs
- GR006 Other Research Activities

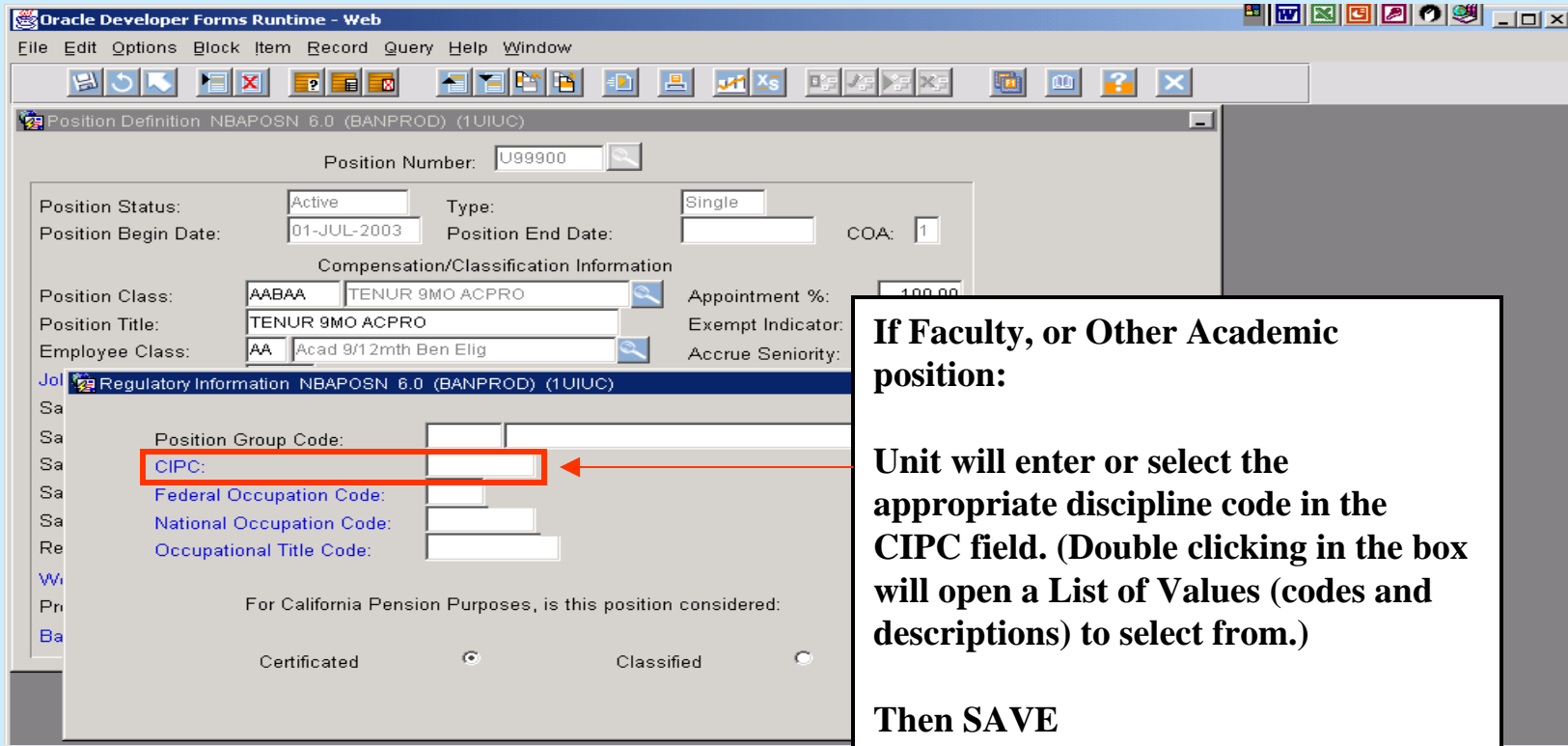
## Step 11. List of Position Descriptors for Grad Teaching Assistant positions (continued)

- GT001 Teaching Classes
- GT002 Grading Student Assignments
- GT003 Leading Lab or Discussion Group in a Course Setting
- GT004 Developing Academic Instructional Materials
- GT005 Accompanying/Coaching Musical or Vocal Performances
- GT006 Providing Artistic Instruction
- GT007 Proctoring Exams
- GT008 Overseeing/Coordinating the Work of other TAs
- GT009 Holding Office Hours
- GT010 Tutoring Students

## Step 11. List of Position Authority Descriptor Codes required for Academic Professional and Faculty positions

- ABDRS Has budget approval authority
- APAL Has purchase authority of \$5,000 or more  
(Required for State Economic Interest reporting.)
- ARAMP RAMP Administrator
- ASLT Supervises less than 20 employees
- ASMT Supervises 20 employees or more  
(Required for State Economic Interest reporting.)

## Step 12. Regulatory window on NBAPOSN Options menu— Unit needs to complete this code when revising a position based on the attributes of the e-class



**If Faculty, or Other Academic position:**

Unit will enter or select the appropriate discipline code in the CIPC field. (Double clicking in the box will open a List of Values (codes and descriptions) to select from.)

**Then SAVE**

Step 12. Regulatory window on NBAPOSN Options menu—  
Unit needs to complete this code when revising a position  
based on the attributes of the e-class (cont'd)

Oracle Developer Forms Runtime - Web  
File Edit Options Block Item Record Query Tools Help Window

Position Definition NBAPOSN 6.0.1.1 (BANPROD) (1UIUC)

Position Number: 000171

Position Status: Active Type: Single  
Position Begin Date: 01-JUN-2004 Position End Date: COA: 1

Compensation/Classification Information

Position Class: SARGA SPEC STSVC FINAD Appointment %: 100.00  
Position Title: SPEC STSVC FINAD Exempt Indicator:   
Employee Class: BA Acad/Pro 12mth Ben Elig Accrue Seniority:

Regulatory Information NBAPOSN 6.0.1.1 (BANPROD) (1UIUC)

Position Group Code:   
CIPC:   
Federal Occupation Code:   
National Occupation Code:   
Occupational Title Code:

For California Pension Purposes, is this position considered:

Certificated  Classified

**If Academic Professional or Academic Hourly position:**

**Unit will enter the PAPE number for this position in the National Occupation Code field.**

**Then SAVE**

Maintenance of the Position to change the position class and related forms is now complete.