

Modify Position

You can use the Modify Position action to reflect the following changes in an employee's assignment: Work Days, FTE, Position Title and Attributes, or Funding.

Step 1: Enter the Effective Date of the Modify Position.

NOTE: You must enter the Effective Date **before** you select any action. The Effective Date will become display-only after the action is selected.

Step 2: Select Modify Position from the Action List.

The screenshot shows the 'ViewChange' interface. At the top, there are summary fields: Department 6987 Imagination, Location 110 Imagination K-8, Employee 005439 Christie,Agatha, Fiscal Year 2014, General Fund Balance 1.500, Title I Balance 0.090, and Title IC Balance 0.000. Below this is a table with columns: Effective Date, Seq, Action, Name, Empl ID, Rcd #, Position #, and Assignment Title. The first row shows an effective date of 07/01/2013 and a 'Baseline' action. The second row shows the same effective date and a 'Modify Position' action, which is highlighted with a red circle. A dropdown menu is open below the 'Modify Position' action, listing options: End Employment, Leave of Absence, Location Change, Modify Position, Transfer Out, Transfer Within, and Unassignment. The 'Modify Position' option is also circled in red. Buttons for 'OK', 'Cancel', and 'Apply' are at the bottom.

Step 3: If changing the Work Days, enter the new Work Days for the employee.

NOTE: You can click on the  to look up Work Days.

Step 4: If changing the FTE, enter the new FTE for the employee.

Step 5: If changing Work Days and/or FTE only, click OK to return to the Staffing Summary page.

Step 6: If changing Position Attributes or Funding, click on Position Details.

The screenshot shows the 'Staffing Summary' page. At the top, there are summary fields: Fiscal Year 2014, General Fund Balance 1.500, Title I Balance 0.090, and Title IC Balance 0.000. Below this is a table with columns: Name, Empl ID, Rcd #, Position #, Assignment Title, Vacancy Status, Empl Status, Dept ID, Loc, Work Days, Posn FTE, and Position Details. The first row shows Christie,Agatha with Empl ID 005439, Rcd # 0, Position # 00007000, Assignment Title Teacher-K8 Gr 1-2, Active status, Dept ID 6987, Loc 110, Work Days 190, and Posn FTE 1.000. The second row shows the same employee with Work Days 190 and Posn FTE 1.000. The '190' in the Work Days column and the '1.000' in the Posn FTE column are circled in red. A magnifying glass icon is next to the '190' value, and a 'Position Details' link is next to the '1.000' value.

BEFORE POSITION DETAIL

ENTRY, PLEASE NOTE: Please make changes in the correct order, beginning with the Proposed Position Information, then moving to the Proposed Funding Distribution. Click Apply, then check the Chartfield Information and make changes if needed.

Step 7: If changing the assignment, review the Proposed Position Information. If making changes, edit the existing row(s) or use the + - buttons to add or delete assignment rows as needed.

NOTE: If you delete an assignment row, click Apply prior to leaving the page.

NOTE: To change an assignment you will modify the position attributes such as Position Group, Position Type, etc.

NOTE: You can type the first letter of the word you're looking for to narrow the list of choices.

NOTE: If the assignment is IB or AP, check the appropriate box.



Step 8: Enter the Percent of Time the employee is working in each portion of their assignment. This should total 100.

The screenshot shows the 'Position Details' section with fields for Department (6987), Location (110), Employee (005439), Position (00007000), Effective Dt (07/01/2013), and Loc Type (KB). It also shows 'General Fund Balance 1,500' and 'Title I Balance 0.090'. Below this is a table for 'Proposed Position Information' with columns for Position Group, Position Type, Lowest Grade, Highest Grade, General Subject, Specific Subject, IB, AP, and Percent of Time. Two rows are shown: one for 'Classroom/Self-Contained' (60% AP) and one for 'Vocal Music' (40% AP). The 'Assignment Title' is 'Teacher-K8 AdvVocal Music' and 'Total Days' is 190. A 'Proposed Funding Distribution' table below shows 'General Fund' with 'Posn FTE' of 1.000.

Step 9: Click on Generate System Title or Click on Enter Custom Title.

NOTE: Generate System Title will use a system format for the title. The new Position Title will show in the blue box. If this does not accurately describe the assignment you may Enter Custom Title (the blue box will become an editable field.) If no selection is made, the title will populate as system-generated when the page is saved.

This screenshot is similar to the previous one but highlights the 'Generate System Title' button in the 'Proposed Position Information' section with a red circle. The 'Assignment Title' field now contains 'Teacher-K8 AdvVocal Music' in a blue box, indicating it is system-generated.

Step 10: If changing the Funding, review the Proposed Funding Distribution. If making changes, edit the existing row(s) or use the   buttons to add or delete funding rows as needed.

NOTE: To change the FTE distribution on Funding rows, do not zero out the FTE on one row, then add a new row. Instead, add the new row, enter the FTE for that Funding Source, then delete the zero FTE row.

NOTE: If you delete a funding row, click Apply prior to leaving the page.

Step 11: To change the Funding, select the Funding Source.


NOTE: When a Grant funding source is selected the Project/Grant number will auto-populate unless you choose "Other Grants". If you choose "Other Grants", you will need to identify the Grant number.

NOTE: When a grant number populates, the Grant End Date will display. This field cannot be edited.

Step 12: Update the Posn FTE with the appropriate FTE amount for each row.

NOTE: The distribution percentages and weighted FTE will calculate automatically.

Position Details

Department	6987	Imagination	Notes	Fiscal Year	2014
Location	110	Imagination K-8		General Fund Balance	1.500
Employee	005439	Christie,Agatha		Title I Balance	0.090
Position	00007000	Teacher-K8 Art/Vocal Music		Title IC Balance	0.000
Effective Dt	07/01/2013	Seq 2	Action Modify Position	Posn FTE	1.000
Loc Type	K8	Grp Type	Sch K8	Low Gr	*K High Gr 08

Action Flag: Initial Add



Click to view Current Position and Funding Information

Position Group	Position Type	Lowest Grade	Highest Grade	General Subject	Specific Subject
Licensed	Teacher	01	02	Classroom/Self-Contained	

Assignment Title: Teacher-K8 Gr 1-2



Funding Source	Project/Grant	Posn FTE
General Fund		1.000

Proposed Position Information

	Position Group	Position Type	Lowest Grade	Highest Grade	General Subject
	Licensed	Teacher	*K	08	Art
	Licensed	Teacher	*K	08	Music

Generate System Title
 Enter Custom Title
 Assignment Title: **Teacher-K8 Art/Vocal Music**
 Total Day:

Proposed Funding Distribution

	Funding Source	Project/Grant	Posn FTE	Grant End Date
	General Fund		.90	
	Other projects/grants	G1258	.10	12/31/2013

Override default funding

Press Apply before clicking to view Chartfield Information

Step 13: Click OK or Apply to save the changes.

NOTE: If a funding group is missing in the chartfield grid, you will not be able to save the change. Call your Budget Analyst for assistance.

NOTE: If you click OK, you'll be taken back to the View/Change page. If you click Apply, you can stay on the Position Details page to make additional changes or view the Chartfields.

NOTE: Click the collapsed Chartfield grid arrow to view the chartfields. You can edit the fields if needed, and save.

NOTE: If you make additional changes in the Position Details area and save them, any edits you made to chartfields will be over-written and you'll need to re-enter them.

Proposed Funding Distribution				
	Funding Source	Project/ Grant	Posn FTE	Grant End Date
+ -	General Fund		0.900	
+ -	Other projects/grants	G1258	0.100	12/31/2013

Override default funding

Press Apply before clicking to view Chartfield information

Budget Approval	Grant Approval	HR Approval	SPED Approval	ESL Approval
	N/A		N/A	N/A

OK Cancel Apply

NOTE: On the View/Change page, changes you made will be highlighted in blue.

Department	6987	Imagination	Fiscal Year	2014
Location	110	Imagination K-8	General Fund Balance	1,600
Employee	005439	Christie,Agatha	Title I Balance	0,090
			Title IC Balance	0,000

Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title	Empl Status	Dept ID	Loc	Work Days	Posn FTE	Position Details
07/01/2013	1	Baseline	Christie,Agatha	005439	0	00007000	Teacher-K8 Gr 1-2	Active	6987	110	190	1,000	Position Details
07/01/2013	2	Modify Position	Christie,Agatha	005439	0	00007000	Teacher-K8 Art/Vocal Music	Active	6987	110	190	1,000	Position Details



OK Cancel Apply

Step 14: Click OK to return to the Staffing Summary page.

Department	6987	Imagination	Fiscal Year	2014
Location	110	Imagination K-8	General Fund Balance	1,600
Employee	005439	Christie,Agatha	Title I Balance	0,090
			Title IC Balance	0,000

Effective Date	Seq	Action	Name	Empl ID	Rcd #	Position #	Assignment Title
07/01/2013	1	Baseline	Christie,Agatha	005439	0	00007000	Teacher-K8 Gr 1-2
07/01/2013	2	Modify Position	Christie,Agatha	005439	0	00007000	Teacher-K8 Art/Vocal Music

OK Cancel Apply

Step 15: Note that the  next to the row has changed to a , indicating a change.

Step 16: Note any changes to your General Fund FTE and Title I balances.

Staffing Summary		Limited Term Staffing Summary		Funding Summary		Allocations & Balances	
Department	6987	Imagination	Fiscal Year		2014		
Location	110	Imagination K-8	General Fund Balance	1,600		<input type="button" value="Approve & Submit"/> <input type="button" value="SMT Help"/>	
Status	Open		Title I Balance	0.090		<input type="button" value="Open/Edit"/> <input type="button" value="Employee Lookup"/>	
			Title IC Balance	0.000		<input type="button" value="Run SMT Roster"/>	

Filled Positions		Personalize		Find	View All	Print	FTE	1-15 of 34	Last
View / Change	Name	Assignment Title	Total FTE	Empl Status	Effective Date	Notes	Position #	Empl ID	Rcd #
1 ▲	Angelou, Maya	Teacher-K8 Gr 5	1.000	Active	06/30/2014		00001269	003249	0
2 ▲	Baez, Joan	Teacher-K8 Gr 4	1.000	Active	07/01/2013		00006999	021138	0
3 ▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Active	07/01/2013		00000382	016830	0
4 ▲	Banderas, Antonio	Teacher-K8 Gr 4 Spanish Imm	0.500	Leave	07/01/2013		00000382	016830	1
5 ▲	Charles, Ray	Teacher-K8 Gr 1 Spanish Imm			08/01/2013		00006998	017595	0
6 ▲	Christie, Agatha	Teacher-K8 Art/Vocal Music	1.000	Active	07/01/2013		00007000	005439	0
7 ▲	Curie, Marie	Principal-K8			07/01/2013		00003668	011362	0
8 ▲	Dell Salvador	Teacher-K8 Gr 3 Spanish Imm	1.000	Active	07/01/2013		00010048	021104	0

The action is complete!

You have now modified a position.