

# POSITION CONTROL & POSITION CHANGE MODULES

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# Position Control & Position Change Modules

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# Position Control & Position Change Modules

To make changes to the HRIS cost centers for a department, start with the Position Control Module on HRIS. A cost center should never be deleted from HRIS because all history for that cost center will be lost. The only exception would be if a cost center was set up in error and has never been used. Please contact Centralized Payroll for assistance with deleting cost centers.

## Viewing a List of Cost Centers and Positions in the Cost Center

To enter the Position Control Module, select 'position control' from the main HRIS menu

```
A3449800          STATE OF IOWA
7.1.0             HUMAN RESOURCES
                  AVAILABLE APPLICATIONS MENU

                  PF1    MAIL
                  PF2    POSITION CONTROL
                  PF3    POSITION CHANGE REQUEST
                  PF4    PERSONNEL ACTIONS (P-1S)
                  PF5    EMPLOYEE INFORMATION
                  PF6    PAYROLL CONTROLS
                  PF7    TIME REPORTING
                  PF8    POSITION TYPES
                  PF9    SECURITY SYSTEM
                  PF10   HIRING FREEZE WAIVERS
                  PF11   WARRANT INFORMATION
                  CLEAR  LEAVE THIS MENU

                  PLACE THE CURSOR ON THE LINE OR PRESS THE PF KEY

                                                                *MAIL WAITING*
```

From the Position Control Main Menu, select Cost Centers by Number.

```
A3324300          HUMAN RESOURCE MANAGEMENT SYSTEM
HR00              POSITION CONTROL
                  MAIN MENU

                  PF1    CLASSES BY CLASS NUMBER
                  PF2    CLASSES BY CLASS TITLE
                  PF3    POSITIONS IN A COST CENTER
                  PF4    EMPLOYEES IN A COST CENTER
                  PF5    COST CENTERS BY NUMBER
                  PF6    PAY PLANS
                  PF7    POSITIONS BY NUMBER
                  PF8    WORK LOCATIONS BY CITY
                  PF9    * * * * HELP * * * *
                  PF10   EEO CENSUS STATISTICS DETAIL
                  PF11   UNDERUTIL FOR EEO UNIT/CLASS
                  PF13   CLASS TYPE UPDATE
                  PF14   PAYMTX TYPE UPDATE
                  PF15   APPROPRIATION FUNDING UPDATE
                  CLEAR  LEAVE THE APPLICATION

                  PLACE THE CURSOR ON THE LINE OR PRESS THE PF KEY

                  GOOD MORNING, WELCOME TO POSITION CONTROL
```

## Position Control & Position Change Modules

Enter the department number in the 'enter cost center' line action field and press enter. This will bring up the first cost center for that department. On this screen look at the active flag to determine if this cost center is currently active on HRIS. If a cost center is active, it will show up in other modules when using the scroll by cost center feature. For example, when in Timesheets by Cost Center, you can scroll between cost centers and all cost centers that are marked as active will show up when scrolling.

```

D3324341                POSITION CONTROL SYSTEM                PAGE: 0001
                        COST CENTER LIST

ENTER COST CENTER  ==> 123-

ACT  NUMBER      NAME                                ACTIVE
-   123-210001  FINANCE / CFO                                    Y
-   123-210002  AR/BILLING/COLLECTION/CRM                       N
-   123-210003  AP,PURCH,ADMIN STAFF                            N
-   123-210005  AP,PURCH,ADMIN STAFF                            Y
L 123-210006  A/R AREA                                        Y
-   123-210010  FINANCE ADMIN SERVICES                          N
-   123-220000  FINANCIAL REPORTING                              Y

L LOOK COST CENTER  PF7 BKWD    PF8 FWD    PF9 HELP    PF12 RETURN  CLEAR EXIT
    
```

To look at the positions in a cost center, type an 'L' on the line action field next to the cost center you want to look at and press enter. When the Cost Center Update screen is opened; type a 'P' in the header action field to view any positions in the cost center.

```

D3324356                POSITION CONTROL SYSTEM
                        COST CENTER UPDATE

ACTION: P
COST CENTER RETRIEVED
+---- COST CENTER INFORMATION -----+----- FUND SOURCE INFORMATION -----+
| COST CENTER .....: 123-210006 | AGENCY .....: 123 |
| A/R AREA | APPROPRIATION UNIT .....: C85 |
|*WORK LOC : 00012 | ORGANIZATION .....: 1234 |
|*DIV IND : | |
|*SUPPORT : +----- PAYROLL INFORMATION -----|
| EEO UNIT : | TIME SHEET TYPE .....: 001 |
|*EMP UNIT : 000 NOT CLASSIFIED | EXPENSE TYPE KEY .....: N |
| P-5 REQ .: N TRADE HRS ..: N | DETAIL TIME TYPE .....: 30 |
| EXPENSES : N ROTATE SCHED: N | SATELLITE COST CENTER ..: - |
+----- CONTACT USERID INFORMATION -----+
| HRIS .....: |
| PERS ASSISTANT: |
| SYSTEM ACCESS : |
| SKILLS/TRAIN .: |
| STAFF ACTION .: |
+----- * INDICATES SELECTION LIST -----+
A ADD M MODIFY D DELETE AC ACTIVATE IN INACTIVATE
P POSITIONS E EMPLOYEES C COMMENTS W WORK LOCATION
PF1 PREV EFF PF2 NEXT EFF PF3 PREV PF4 NEXT PF9 HELP PF12 RETURN
    
```

# Position Control & Position Change Modules

All positions in the cost center will be listed on the screen. From this screen you can scroll between cost centers using the F1 and F2 keys.

D3324351	POSITION CONTROL SYSTEM	PAGE: 0001
POSITIONS IN A COST CENTER		
ENTER COST CENTER	===> 123-210006	A/R AREA
ENTER POS. NUMBER	===> 123-C85-2235-00018-002	
ACT POSITION NUMBER	EMPLOYEE NAME	CLASS TITLE
_ 123-C85-2235-00018-002	**** V A C A N T ****	CLERK-SPEC
L LOOK AT THE POSITION		
PF1 PREV CC PF2 NEXT CC PF7 BKWD PF8 FWD PF9 HELP PF12 RETURN CLEAR EXIT		

# Position Control & Position Change Modules

## Setting up a New Cost Center

From the cost center listing, choose an active cost center that is set up similar to the one you are wanting to create and type 'L' to pull that cost center up.

Type an 'A' in the Header Action Field to ADD a new cost center. **Before** pressing enter, you will need to change:

- The cost center number
- The cost center name

At this time you can also change the funding source information if you need to. If you want the cost center to be on the Time Reporting System:

- Time Sheet Type should be set to 001 (EMPL-SUPR-PROC)
  - Time Sheet Type is blank for cost centers reporting on PAYN
  - Time Sheet Type is set to 002 (OFF-PROC) if department passes a timesheet file
- Expense Type Key should be set to N
- Detail Time Type will be either a 10 (No Work Reporting) or a 30 (Work Reporting).

Funding Source:

- The fund source information must first be set up on the header file before you will be able to set up the cost center. Before it can be set up on the header file, it must be set up on the I/3 accounting system and a weekend update must have occurred. Information can be found later in the manual on how to set up a header file. Please contact SAE for assistance in setting up a header file.

Work Location:

- The work Loc field should be the building code the employees in this cost center are located.
- The fields of EMP UNIT, P-5 REQ, EXPENSES, TRADE HRS, AND ROTATE SCHED are all required fields on the cost center setup. Typically they will be N

```
D3324356                POSITION CONTROL SYSTEM
                        COST CENTER UPDATE

ACTION:  A
COST CENTER RETRIEVED
+---- COST CENTER INFORMATION -----+----- FUND SOURCE INFORMATION -----+
| COST CENTER .....: 123-210016 | AGENCY .....: 123 | |
|  NEW COST CENTER NAME          | APPROPRIATION UNIT .....: C85 |
|*WORK LOC : 00012              | ORGANIZATION .....: 2250 |
|*DIV IND :                    | | |
|*SUPPORT :                    +----- PAYROLL INFORMATION -----|
| EEO UNIT :                   | TIME SHEET TYPE .....: 001 |
|*EMP UNIT : 000 NOT CLASSIFIED | EXPENSE TYPE KEY .....: N |
| P-5 REQ .: N TRADE HRS ..: N | DETAIL TIME TYPE .....: 30 |
| EXPENSES : N ROTATE SCHED: N | SATELLITE COST CENTER ...: - |
+----- CONTACT USERID INFORMATION -----+
| HRIS .....: |
| PERS ASSISTANT: |
| SYSTEM ACCESS : |
| SKILLS/TRAIN ..: |
| STAFF ACTION ..: |
+----- * INDICATES SELECTION LIST -----+
A ADD      M MODIFY      D DELETE      AC ACTIVATE      IN INACTIVATE
P POSITIONS      E EMPLOYEES      C COMMENTS      W WORK LOCATION
PF1 PREV EFF PF2 NEXT EFF PF3 PREV PF4 NEXT      PF9 HELP PF12 RETURN CLEAR EXIT
```

# Position Control & Position Change Modules

When you press enter, the cost center should be added and activated. You can tell that it has been both added and activated by the message as show below.

```
D3324356                POSITION CONTROL SYSTEM
                        COST CENTER UPDATE

ACTION:  _
COST CENTER ADDED AND ACTIVATED
+---- COST CENTER INFORMATION -----+----- FUND SOURCE INFORMATION -----+
| COST CENTER .....: 123-210016 | AGENCY .....: 123 |
| NEW COST CENTER NAME | APPROPRIATION UNIT .....: C85 |
|*WORK LOC : 00012 | ORGANIZATION .....: 2250 |
|*DIV IND : | |
|*SUPPORT : +----- PAYROLL INFORMATION -----|
| EEO UNIT : | TIME SHEET TYPE .....: 001 |
|*EMP UNIT : 000 NOT CLASSIFIED | EXPENSE TYPE KEY .....: N |
| P-5 REQ .: N TRADE HRS ..: N | DETAIL TIME TYPE .....: 30 |
| EXPENSES : N ROTATE SCHED: N | SATELLITE COST CENTER ..: - |
+----- CONTACT USERID INFORMATION -----+
| HRIS .....: |
| PERS ASSISTANT: |
| SYSTEM ACCESS : |
| SKILLS/TRAIN .: |
| STAFF ACTION .: |
+----- * INDICATES SELECTION LIST -----+
A ADD      M MODIFY      D DELETE      AC ACTIVATE      IN INACTIVATE
P POSITIONS      E EMPLOYEES      C COMMENTS      W WORK LOCATION
PF1 PREV EFF PF2 NEXT EFF PF3 PREV PF4 NEXT      PF9 HELP PF12 RETURN CLEAR EXIT
```

Once a cost center has been set up, you can now create new positions or move employees into that new cost center.

## Inactivating a Cost Center

If there are no positions in a cost center, then it should be inactivated. If there are vacant positions in the cost center, it will need to be determined if these positions should be delete or moved before you can inactivate the cost center.

```
D3324351                POSITION CONTROL SYSTEM                PAGE: 0001
                        POSITIONS IN A COST CENTER
ENTER COST CENTER ===> 123-120000  LEGAL RULES & PLANNING
ENTER POS. NUMBER ===> - - - -
* * SEARCH KEY HIGHER THAN HIGHEST POSITION * *
ACT POSITION NUMBER      EMPLOYEE NAME                CLASS TITLE

L LOOK AT THE POSITION
PF1 PREV CC  PF2 NEXT CC  PF7 BKWD  PF8 FWD  PF9 HELP  PF12 RETURN  CLEAR EXIT
```

# Position Control & Position Change Modules

To inactivate the cost center, type an IN in the header action field and press enter. After pressing enter, you will see the message 'COST CENTER SUCCESSFULLY INACTIVATE'.

```
D3324356                POSITION CONTROL SYSTEM
                        COST CENTER UPDATE

ACTION: IN
COST CENTER SUCCESSFULLY INACTIVATED

+---- COST CENTER INFORMATION -----+----- FUND SOURCE INFORMATION -----+
| COST CENTER .....: 123-120005 | AGENCY .....: 123 |
| DIRECTOR                | APPROPRIATION UNIT .....: C85 |
|*WORK LOC : 00012        | ORGANIZATION .....: 1100 |
|*DIV IND :                |
|*SUPPORT :                +----- PAYROLL INFORMATION -----|
| EEO UNIT :                | TIME SHEET TYPE .....: 001 |
|*EMP UNIT : 000 NOT CLASSIFIED | EXPENSE TYPE KEY .....: N |
| P-5 REQ .: N TRADE HRS .: N | DETAIL TIME TYPE .....: 10 |
| EXPENSES : N ROTATE SCHED: N | SATELLITE COST CENTER ..: - |
+----- CONTACT USERID INFORMATION -----+
| HRIS .....:                |
| PERS ASSISTANT:            |
| SYSTEM ACCESS :          |
| SKILLS/TRAIN .:          |
| STAFF ACTION .:          |
+----- * INDICATES SELECTION LIST -----+
A ADD      M MODIFY      D DELETE      AC ACTIVATE      IN INACTIVATE
P POSITIONS      E EMPLOYEES      C COMMENTS      W WORK LOCATION
```

# Position Control & Position Change Modules

## Reactivating a Cost Center

If later it is determined that a cost center needs to be reactivated, type an AC in the header action field and press enter. After pressing enter, you will see the message 'COST CENTER SUCCESSFULLY ACTIVATED'. **When reactivating a cost center, please contact Centralized Payroll to ensure the FUND SOURCE INFORMATION is still on the payroll header file.** It is important to ensure the fund source information is currently on the payroll header file because it will cause an error on the accounting system when payroll processes, and will require steps for correction.

```
D3324356                POSITION CONTROL SYSTEM
                        COST CENTER UPDATE

ACTION: AC
COST CENTER SUCCESSFULLY ACTIVATED

+---- COST CENTER INFORMATION -----+----- FUND SOURCE INFORMATION -----+
| COST CENTER .....: 123-120005 | AGENCY .....: 123 |
| DIRECTOR          | APPROPRIATION UNIT .....: C85 |
|*WORK LOC : 00012   | ORGANIZATION .....: 1100 |
|*DIV IND :         |
|*SUPPORT :         +----- PAYROLL INFORMATION -----|
| EEO UNIT :         | TIME SHEET TYPE .....: 001 |
|*EMP UNIT : 000 NOT CLASSIFIED | EXPENSE TYPE KEY .....: N |
| P-5 REQ .: N TRADE HRS ...: N | DETAIL TIME TYPE .....: 10 |
| EXPENSES : N ROTATE SCHED: N | SATELLITE COST CENTER ..: - |
+----- CONTACT USERID INFORMATION -----+
| HRIS .....: |
| PERS ASSISTANT: |
| SYSTEM ACCESS : |
| SKILLS/TRAIN .: |
| STAFF ACTION .: |
+----- * INDICATES SELECTION LIST -----+
A ADD      M MODIFY      D DELETE      AC ACTIVATE      IN INACTIVATE
P POSITIONS      E EMPLOYEES      C COMMENTS      W WORK LOCATION
PF1 PREV EFF PF2 NEXT EFF PF3 PREV PF4 NEXT      PF9 HELP PF12 RETURN CLEAR EXIT
```

# Position Control & Position Change Modules

## Cost Center Change – M-5 #230

Start out on the Main Menu of HRIS and select Position Change Request.

```
A3449800          STATE OF IOWA          02/24/16
7.1.0            HUMAN RESOURCES      10:04 AM
                AVAILABLE APPLICATIONS MENU

                PF1      MAIL
                PF2      POSITION CONTROL
                PF3      POSITION CHANGE REQUEST
                PF4      PERSONNEL ACTIONS (P-1S)
                PF5      EMPLOYEE INFORMATION
                PF6      PAYROLL CONTROLS
                PF7      TIME REPORTING
                PF8      POSITION TYPES
                PF9      SECURITY SYSTEM
                PF10     HIRING FREEZE WAIVERS
                PF11     WARRANT INFORMATION
                CLEAR    LEAVE THIS MENU

                PLACE THE CURSOR ON THE LINE OR PRESS THE PF KEY

                                     *MAIL WAITING*
```

From the Position Change Request Menu, select Positions by Position Number.

```
A3325500          HUMAN RESOURCE MANAGEMENT SYSTEM  02/24/16
M501             POSITION CHANGE REQUEST (M-5)  10:04 AM
                ADMINISTRATOR'S MENU

                PF1      M-5S FOR A COST CENTER
                PF2      POSITIONS IN A COST CENTER
                PF3      WRITE M-5 FOR A NEW POSITION
                PF4      M-5S FOR A PAY PERIOD
                PF5      M-5S FOR A POSITION
                PF6      POSITIONS BY POSITION NUMBER
                PF7      M-5S PENDING APPROVAL
                PF8      M-5 CONTROL UPDATE
                PF9      * * * * HELP * * * *
                PF10     M-5 APPROVAL UPDATE
                PF11     M-5 TYPE UPDATE
                PF13     PURGE CANCELLED M-5S
                CLEAR    LEAVE THE APPLICATION

                PLACE THE CURSOR ON THE LINE OR PRESS THE PF KEY

                GOOD MORNING, WELCOME TO POSITION CHANGE REQUEST
```

Once you have the listing of positions, you will type the position number that you want to update in the ENTER POSITION NO Field.

# Position Control & Position Change Modules

D3325546	POSITION CHANGE REQUEST (M-5)	PAGE: 0001
POSITIONS BY POSITION NUMBER		
ENTER POSITION NO. ==> 123-R31-1110-00018-001		
ACT POSITION NUMBER	EMPLOYEE NAME	TITLE
_ 123-R31-1110-00018-001	MELISSA I SHARK	CLERK-SPEC
_ 123-R31-1110-00018-002	MICHAEL J MONK	CLERK-SPEC
_ 123-R31-1110-00705-800	**** V A C A N T ****	ADMIN INTERN
_ 123-R31-1110-00711-001	RUSSELL V BIBBLE	EX OFF 2
_ 123-R31-1110-00736-001	KENNETH R JONES	MGT ANLST 3
_ 123-R31-1110-00307-001	MICHAEL W SMITH	ACCT CLERK
_ 123-R31-1110-10015-001	TIMOTHY E BEAR	ACCOUNTANT I
_ 123-R31-1110-10018-001	**** V A C A N T ****	BUDGET ANALYST
L LOOK M M-5S W WRITE M-5 PF7 BKWD PF8 FWD PF9 HELP PF12 RETURN CLEAR EXIT		

Once you have the position that you want to change on the screen, you will type a 'W' in the Line Action Field next to the position to be changed.

D3325546	POSITION CHANGE REQUEST (M-5)	PAGE: 0001
POSITIONS BY POSITION NUMBER		
ENTER POSITION NO. ==> 123-R31-1110-00018-001		
ACT POSITION NUMBER	EMPLOYEE NAME	TITLE
_ 123-R31-1110-00018-001	MELISSA I SHARK	CLERK-SPEC
_ 123-R31-1110-00018-002	MICHAEL J MONK	CLERK-SPEC
_ 123-R31-1110-00705-800	**** V A C A N T ****	ADMIN INTERN
_ 123-R31-1110-00711-001	RUSSELL V BIBBLE	EX OFF 2
_ 123-R31-1110-00736-001	KENNETH R JONES	MGT ANLST 3
<b>W</b> 123-R31-1110-00307-001	MICHAEL W SMITH	ACCT CLERK
_ 123-R31-1110-10015-001	TIMOTHY E BEAR	ACCOUNTANT I
_ 123-R31-1110-10018-001	**** V A C A N T ****	BUDGET ANALYST
L LOOK M M-5S <b>W WRITE M-5</b> PF7 BKWD PF8 FWD PF9 HELP PF12 RETURN CLEAR EXIT		

## Position Control & Position Change Modules

Once you have pressed enter, the list of possible M-5's appears. You will tab to the action that you wish to take and put an 'S' in the Line Action Field next to that action.

```

D3325543          POSITION CHANGE REQUEST (M-5)          PAGE: 0001
                   M-5 TYPE SELECTION LIST

* * TYPE AN 'S' NEXT TO THE TYPE OF M-5 YOU WISH TO SELECT * *

ACTION  ----- TYPE DESCRIPTION -----
  - RECLASSIFICATION
  - RECLASSIFICATION - NON-EXECUTIVE
  - POSITION TYPE CHANGE
  - POSITION TYPE CHANGE - NON-EXECUTIVE
  S COST CENTER CHANGE
  - COST CENTER CHANGE - NON-EXECUTIVE
  - FTE CHANGE
  - FTE CHANGE - NON-EXECUTIVE
  - FIELD STATUS CHANGE
  - FIELD STATUS CHANGE - NON-EXECUTIVE
  - ADD REPLACEMENT POSITION
  - ADD REPLACEMENT POSITION - NON-EXECUTIVE
  - DELETE POSITION - NON-EXECUTIVE
  - DELETE POSITION
  - PAY DISTRIBUTION UPDATE

S SELECT THE TYPE  D DESCRIPTION OF TYPE  L LOOK AT THE TYPE
PF7 BKWD          PF8 FWD                PF9 HELP                PF12 RETURN          CLEAR EXIT
    
```

In this example, you have selected a Cost Center Change. The screen below will be displayed with that selection. You only need to put in the new cost center and then put the approval on the P1. The other information will fill in automatically.

```

D3325561 ACT: _   +---- POSITION CHANGE (M-5) -- +----- M-5 TYPE -----+
PRINTER:          | 123-R31-1110-01337-001 | 230 COST CENTER CHG |
+-----+-----+ M-5 NUMBER....: XX-XXXX |----- APPROVED BY -----|
| M-5 STATUS      | EFFECTIVE DATE: XX/XX/XXXX | PA  DEPT PROC      |
| PENDING PROCESSING | COST CENTER...: XX-XXXXXXX | YES YES NO        |
+-----+-----+-----+-----+-----+-----+-----+
REMARKS: TERRY VALENTINE SR MOVE PER B.GARTNER/T. RYBURN

----- F R O M ----- D E S C ----- T O -----PAGE : 1 OF 6
          123 | AGENCY | 123
          R31 | APPROP UNIT | R31
          1110 | ORG CODE | 1110
ACCT CLERK      00307 | CLASS CODE |
                001 | SEAT NUMBER |
ADMINISTRATION  123-544045 | COST CENTER | 123-544115 ACCOUNTING
                | |
                | | * INDICATES SELECTION LIST

-----
O POS INFO L ACT LOG H HRD CPY P PROOF Y APPROVE N UNAPPROVE C CANCEL D DENY
R REMARKS S SEL LIST P1 P-1S PF7 BKWD PF8 FWD PF9 HELP PF12 RETURN CLEAR EXIT
    
```

Pages 2 through 5 are used only if you need to set up pay distributions for the new position. They should be reviewed to determine if a current payroll distribution exists that needs to be updated or removed.

# Position Control & Position Change Modules

## Payroll Header Files (P-30)

The Payroll Header Files control how the initial charge of payroll expenses are processed on the I/3 accounting system. The payroll header files are updated by departments via submitting a P-30 document to Centralized Payroll. A P-30 document needs to be submitted any time the header file needs to have additions, changes, or deletions.

The payroll header files include the following (updated via the P-30 Document); Account Codes Listing, 10-Digit Dept. Listing, 6-Digit Dept. Listing, IPERS Codes, and Unemployment Codes. The IPERS and Unemployment codes are completed by Centralized Payroll.

PAYROLL HEADER FILE ACCOUNT CODES LISTING								
PAYROLL-NO	A C C O U N T I N G C O D E S							
	FISCAL YEAR	FUND	AGENCY	ORG	SUB ORG	ACTIVITY	JOB NUMBER	REPORT CATEGORY
005-C85-1234		001	005	1234				

  

PAYROLL HEADER FILE 10-DIGIT DEPT. LISTING	
PAYROLL-NO	DEPARTMENT NAME
005-C85-1234	DAS-EXAMPLE PAYROLL HEADER

  

PAYROLL HEADER FILE 6-DIGIT DEPT. LISTING	
PAYROLL-NO	DEPARTMENT NAME
005-C85	DEPT. OF ADMINISTRATIVE SERVICES

When a cost center is set up for the first time, or reactivated in HRIS, the fund source information on the cost center screen needs to correspond with an active 10-digit accounting code on the Payroll Header file, which corresponds to an active accounting string in I/3 or the payroll charge will reject when payroll processes

+---- COST CENTER INFORMATION -----+		----- FUND SOURCE INFORMATION -----	
COST CENTER .....		AGENCY .....	
		APPROPRIATION UNIT .....	
*WORK LOC :		ORGANIZATION .....	
*DIV IND :			
*SUPPORT :		+----- PAYROLL INFORMATION -----	
EEO UNIT :		TIME SHEET TYPE .....	001
*EMP UNIT : 000 NOT CLASSIFIED		EXPENSE TYPE KEY .....	N
P-5 REQ .: N TRADE HRS .: N		DETAIL TIME TYPE .....	10
EXPENSES : N ROTATE SCHED: N		SATELLITE COST CENTER ..	-
+----- CONTACT USERID INFORMATION -----			

The Accounting Codes Section of the P-30 identifies the I/3 accounting string that each 10-digit payroll number should be charged. The Department Header Name sections, both 10-digit and 6-digit identifies the name associated with the 10-digit and 6-digit payroll numbers, used on all payroll reports.

# Position Control & Position Change Modules

To set up a new header file, the account code, 10 digit header name and 6 digit header name need to be established. The screen shot below show the fields that need to be completed when setting up, changing or deleting a header file.

P-30 PAYROLL FORM USED TO ADD, CHANGE, OR DELETE RECORDS ON \_\_\_\_\_ Date: \_\_\_\_\_  
 ACCT CODE, DEPT HEADER, IPERS CODE, & UNEMPLOYMENT FILES \_\_\_\_\_ Completed by: \_\_\_\_\_  
 Pay Period Effective: \_\_\_\_\_

ACTION CODES	10 DIGIT PAYROLL NUMBER	ACCOUNTING CODES						REPORT CATEGORY (4)
		FUND (3)	AGENCY (3)	ORG (4)	SUB ORG (2)	ACTIVITY (4)	JOB NO. (8)	
		I/3 =	DEPT	UNIT	SUB UNIT	TASK	PROGRAM	
A								If Applicable
A								
A								

ACTION CODES	10 DIGIT PAYROLL NUMBER	DEPARTMENT HEADER NAME (60)
H		
H		
H		

ACTION CODES	6 DIGIT PAYROLL NUMBER	DEPARTMENT HEADER NAME (38)
D		
D		
D		

## Steps for the P30 process

Timing of the steps for setting up the payroll header information is critical. The steps must be followed in the correct order for the setup to be successful. The steps below would be necessary to add or change the header file. If you only want to change or enter a payroll distribution for an employee, the payroll header file does not need to be updated.

1. The I/3 Accounting System must have a payroll budget set up for the proposed accounting string.
2. There must be a weekend update between I/3 Accounting and the HRIS system to pass the budget information.
3. A P-30 document is submitted to Centralized Payroll after the weekend update.
4. An evening update must be scheduled for the payroll system. In a normal biweekly payroll schedule, there are no updates the Wednesday and Thursday of pay week.
5. The P-30 is processed and the new information is available for use. Centralized Payroll will notify you that the information has successfully processed.

If you want to delete payroll header file information you must first confirm that there are no positions on HRIS that are using that information. For example, if you have a cost center set up with the funding source codes of 005-C85-1234 and there are only vacant positions, you must first delete those positions or move them to a different 10-digit number. After that has been successfully completed, you can submit a P-30 form to delete the header information.

# Position Control & Position Change Modules

## Payroll Distributions & Bypassed – M-5 #320

When an employees pay needs to be split between different accounts, this can be accomplished by keying a M-5 #320 Pay Distribution Update.

Start with the Position Change Request

```
A3449800          STATE OF IOWA          02/24/16
7.1.0            HUMAN RESOURCES        3:40 PM
                AVAILABLE APPLICATIONS MENU

                _ PF1      MAIL
                _ PF2      POSITION CONTROL
                _ PF3      POSITION CHANGE REQUEST
                _ PF4      PERSONNEL ACTIONS (P-1S)
                _ PF5      EMPLOYEE INFORMATION
                _ PF6      PAYROLL CONTROLS
                _ PF7      TIME REPORTING
                _ PF8      POSITION TYPES
                _ PF9      SECURITY SYSTEM
                _ PF10     HIRING FREEZE WAIVERS
                _ PF11     WARRANT INFORMATION
                _ CLEAR    LEAVE THIS MENU
```

From the Position Change Request Menu, select Positions by Position Number.

```
A3325500          HUMAN RESOURCE MANAGEMENT SYSTEM  02/24/16
M501             POSITION CHANGE REQUEST (M-5)    3:40 PM
                ADMINISTRATOR'S MENU

                _ PF1      M-5S FOR A COST CENTER
                _ PF2      POSITIONS IN A COST CENTER
                _ PF3      WRITE M-5 FOR A NEW POSITION
                _ PF4      M-5S FOR A PAY PERIOD
                _ PF5      M-5S FOR A POSITION
                _ PF6      POSITIONS BY POSITION NUMBER
                _ PF7      M-5S PENDING APPROVAL
                _ PF8      M-5 CONTROL UPDATE
                _ PF9      * * * * HELP * * * *
                _ PF10     M-5 APPROVAL UPDATE
                _ PF11     M-5 TYPE UPDATE
                _ PF13     PURGE CANCELLED M-5S
                _ CLEAR    LEAVE THE APPLICATION
```

Type in the position number you want to update the payroll distribution on and then enter 'W' to write a new M-5 for the position, select Pay distribution update

```
D3325543          POSITION CHANGE REQUEST (M-5)
                M-5 TYPE SELECTION LIST

ACTION  ----- TYPE DESCRIPTION -----
_      DELETE POSITION
_      PAY DISTRIBUTION UPDATE
_      FUND PERCENT UPDATE
```

## Position Control & Position Change Modules

Enter the funding string and the percent of the employees pay to be distributed. Up to 4 different distributions can be added.

```

D3325562 ACT:  _      +--- POSITION CHANGE (M-5) -- +----- M-5 TYPE -----+
PRINTER:          |    123-R31-1234-00018-001   |    320 PAY DIST UPDATE   |
+-----+-----+ | M-5 NUMBER...: XX-XXXX   |----- APPROVED BY -----|
|    M-5 STATUS   | EFFECTIVE DATE: XX/XX/XXXX   | PA   PROC               |
| PENDING PROCESSING | COST CENTER...: XXX-XXXXXX   | YES  NO                 |
+-----+-----+ +-----+-----+
REMARKS:

----- F R O M ----- D E S C ----- T O ----- PAGE:  1 OF  4
          | FISCAL YEAR (1) |
          001 |    FUND    |    001
          123 |   AGENCY  |    123
          1234 |  ORG CODE |   WXYZ
          |   SUB ORG   |
          1100 |   OBJECT  |
          |   ACTIVITY  |
          |   JOB NUMBER  |
          |   REPORT    |
          50.0 |  PERCENT  |   50.0
    
```

To change or delete a pay distribution, another M-5 #320 can be keyed to change the funding string, percentage or delete out all fields.

A quick way to see if an employee has a pay distribution in their record is to:

- Go to their employee information screen
- Enter 'O' in the ACT line
- Enter 'PD' in the ACT line

```

M3324365          POSITION CONTROL SYSTEM
                  PAY DISTRIBUTION UPDATE

+-----+-----+
| COST CENTER : 123-210001   | POSITION: 123-R31-1234-00018-001
| FINANCE / CFO              | +----- CURRENT POSITION HOLDER -----
| CLASS CODE  .: 07005       | NAME:
| CLASS TITLE : CLERK-SPEC   | SSAN:
+-----+-----+
|                               | FUNDING SOURCE -----
|                               | GEN  PRF  RUT  FED  OTHER
| APPROP                      |
| POS  100.0                   |
+-----+-----+

PAY                ACCOUNT NUMBER
DISTRIBUTION      FY FND AGY ORG SORG OBJ ACTY JOB NUM  RPT    PERCENTAGE
1                 001 123 WXYZ  1100                                50.0
    
```

When a pay distribution is going to the same funding string as the cost center, the system will 'bypass' the distribution. A report on the Data Warehouse should be utilized to monitor this. The report Payroll Distributions & Bypassed X075.N644-A has three tabs. The first tab shows all payroll distributions that occurred for the pay period in which it is run. The Bypassed Distributions tab shows those that were bypassed, or are not needed. The third tab is a summary tab. When you run this report, if no distributions were bypassed, you will get the message of 'No data to retrieve in Bypassed Distributions'. If you do not see this message, it means you have payroll distributions that need to be updated.

# Position Control & Position Change Modules

## Creating a New Position – M-5 #010

Start out on the Main Menu of HRIS and select Position Change Request.

```
A3449800          STATE OF IOWA          02/24/16
7.1.0            HUMAN RESOURCES        3:40 PM
                AVAILABLE APPLICATIONS MENU

                _ PF1      MAIL
                _ PF2      POSITION CONTROL
                _ PF3      POSITION CHANGE REQUEST
                _ PF4      PERSONNEL ACTIONS (P-1S)
                _ PF5      EMPLOYEE INFORMATION
                _ PF6      PAYROLL CONTROLS
                _ PF7      TIME REPORTING
                _ PF8      POSITION TYPES
                _ PF9      SECURITY SYSTEM
                _ PF10     HIRING FREEZE WAIVERS
                _ PF11     WARRANT INFORMATION
                _ CLEAR    LEAVE THIS MENU
```

From the Position Change Request Menu, select Write M-5 For A New Position.

```
A3325500          HUMAN RESOURCE MANAGEMENT SYSTEM  02/24/16
M501             POSITION CHANGE REQUEST (M-5)    3:40 PM
                ADMINISTRATOR'S MENU

                _ PF1      M-5S FOR A COST CENTER
                _ PF2      POSITIONS IN A COST CENTER
                _ PF3      WRITE M-5 FOR A NEW POSITION
                _ PF4      M-5S FOR A PAY PERIOD
                _ PF5      M-5S FOR A POSITION
                _ PF6      POSITIONS BY POSITION NUMBER
                _ PF7      M-5S PENDING APPROVAL
                _ PF8      M-5 CONTROL UPDATE
                _ PF9      * * * * HELP * * * *
                _ PF10     M-5 APPROVAL UPDATE
                _ PF11     M-5 TYPE UPDATE
                _ PF13     PURGE CANCELLED M-5S
                _ CLEAR    LEAVE THE APPLICATION
```

# Position Control & Position Change Modules

Once you have the listing of M-5 types you can select from, put an 'S' next to the type of M-5 that you want to write. In this case, you will select NEW PERMANENT POSITION.

```

D3325543          POSITION CHANGE REQUEST (M-5)          PAGE: 0001
                   M-5 TYPE SELECTION LIST

* * TYPE AN 'S' NEXT TO THE TYPE OF M-5 YOU WISH TO SELECT * *

ACTION  ----- TYPE DESCRIPTION -----
S      NEW PERMANENT POSITION
-       NEW PERMANENT POSITION - NON-EXECUTIVE
-       NEW TEMPORARY POSITION (800 SEAT)
-       NEW TEMPORARY POSITION - NON-EXECUTIVE (800 SEAT)
-       ADD TEMPORARY POSITION (900 SEAT)**
-       ADD TEMPORARY POSITION - NON-EXECUTIVE (900 SEAT)**
-       ADD NEW SLIP POSITION

S SELECT THE TYPE  D DESCRIPTION OF TYPE  L LOOK AT THE TYPE
PF7 BKWD          PF8 FWD                PF9 HELP                PF12 RETURN          CLEAR EXIT
    
```

\*\*900 seat positions are not used for temporary positions by the Executive Branch

The screen prints below show the fields needed to add a new permanent position. The screens are the same for adding a new Temporary Position, a new Temporary/Non-Employee Position, and a New SLIP Position (with the exception of the first screen for the SLIP Position).

To create a new position, you will need to enter the Class Code, Seat Number, Cost Center, Position Type, Funding Code, and Field Status.

```

D3325561 ACT: _   +--- POSITION CHANGE (M-5) -- +----- M-5 TYPE -----+
PRINTER:          | 123-C85-4100-00720-001 | 010 NEW PERM POSTN |
+-----+-----+ M-5 NUMBER....: XX-XXXX |----- APPROVED BY -----|
| M-5 STATUS      | EFFECTIVE DATE: XX/XX/XXXX | PA DEPT DOM HR  PROC |
| PENDING PROCESSING | COST CENTER...: XXX-XXXXXX | NO NO NO NO NO  |
+-----+-----+-----+-----+-----+-----+-----+
REMARKS:

----- F R O M ----- D E S C ----- T O -----PAGE : 1 OF 6
          | AGENCY          | 123
          | APPROP UNIT       | C85
          | ORG CODE          | 4100
          | CLASS CODE       | 00720   CLASS NAME
          | SEAT NUMBER      | 001
          | COST CENTER     | 123-410010 COST CNTR NAME
          | POSITION TYPE* | 02      PERM. FT-NON MERIT
          | POSITION ELIG*    | E       EXEMPT
          | FUNDING CODE*  | 1       P-5 APPROVED
          | FIELD STATUS* | N       NOT FIELD STATUS
          | 1.000 FTE        | 1.000
          |                   | * INDICATES SELECTION LIST

-----
O POS INFO L ACT LOG H HRD CPY P PROOF Y APPROVE N UNAPPROVE C CANCEL D DENY
R REMARKS S SEL LIST P1 P-1S PF7 BKWD PF8 FWD PF9 HELP PF12 RETURN CLEAR EXIT
    
```

# Position Control & Position Change Modules

To get to the selection list (those with a \* next to it), type 'S' in the ACT field and then put your cursor in that field and hit enter.

D3449611	CODE TABLE DISPLAY / SELECTION LIST	C3324101
	POSITION TYPES	
ACT	-----DESCRIPTION AND SYNONYMS-----	
-	PERM FULL TIME-MERT, 00	
-	STATUTORY EMPLOYEE, 01	
-	PERM. FT-NON MERIT, 02	
-	PERM PART TIME-MERT, 03	
-	PERM. PT-NON MERIT, 04	
-	TEMPORARY, 06	
-	SEASONAL, 08	
-	TEMP UNAUTHORIZED, 09	
-	SLIP, 55	
-	SERIP, 56	

D3449611	CODE TABLE DISPLAY / SELECTION LIST	C3324302
	POSITION FUNDING CODES	
ACT	-----DESCRIPTION AND SYNONYMS-----	
-	UNFUNDED, 0	
-	P-5 APPROVED, 1	
-	BLANKET HIRE APPRV., 2	
-	BA REVIEW REQUIRED, 3	
-	NEED P5, 4	
-	EARLY OUT, 8	
-	BUY OUT, 9	

D3449611	CODE TABLE DISPLAY / SELECTION LIST	C3324320
	FIELD STATUS	
ACT	-----DESCRIPTION AND SYNONYMS-----	
	FIELD STAT - NO OVT, Y	
	FIELD STAT - WKND OT, W	
	NOT FIELD STATUS, N	
	FIELD WITH OVERTIME, O	





# Position Control & Position Change Modules

## Reclassify a Position – M-5 #210

A reclassification changes an employee's position into another position

- This differs from a promotion, demotion or transfer where an employee is moved into an existing vacant position and the employee's old position then becomes vacant.
- A reclassification will never result in a position being vacated (unless the position being reclassified is currently vacant).
- Once the M-5 #210 has processed, a P1 #692 Position Reclassification must be written to update the employees record. The M-5 and P1 must be written in the same pay period or the employee will not be paid.

Follow the first four steps above to get to the M-5 selection list

You will tab to the action that you wish to take and put an 'S' in the Line Action Field next to that action.

D3325543	POSITION CHANGE REQUEST (M-5)	PAGE: 0001
	M-5 TYPE SELECTION LIST	
* * TYPE AN 'S' NEXT TO THE TYPE OF M-5 YOU WISH TO SELECT * *		
ACTION	----- TYPE DESCRIPTION -----	
<b>S</b>	<b>RECLASSIFICATION</b>	
-	RECLASSIFICATION - NON-EXECUTIVE	
-	POSITION TYPE CHANGE	
-	POSITION TYPE CHANGE - NON-EXECUTIVE	
-	COST CENTER CHANGE	
-	COST CENTER CHANGE - NON-EXECUTIVE	
-	FTE CHANGE	
-	FTE CHANGE - NON-EXECUTIVE	
-	FIELD STATUS CHANGE	
-	FIELD STATUS CHANGE - NON-EXECUTIVE	
-	ADD REPLACEMENT POSITION	
-	ADD REPLACEMENT POSITION - NON-EXECUTIVE	
-	DELETE POSITION - NON-EXECUTIVE	
-	DELETE POSITION	
-	PAY DISTRIBUTION UPDATE	
S SELECT THE TYPE D DESCRIPTION OF TYPE L LOOK AT THE TYPE		
PF7 BKWD	PF8 FWD	PF9 HELP
	PF12 RETURN	CLEAR EXIT

# Position Control & Position Change Modules

The highlighted fields below are the fields available to change.

```

D3325561 ACT: _      +--- POSITION CHANGE (M-5) -- +----- M-5 TYPE -----+
PRINTER:           | 123-R31-1234-00756-007 | 210 RECLASSIFY |
+-----+-----+ M-5 NUMBER....: XX-XXXX |----- APPROVED BY -----|
| M-5 STATUS      | EFFECTIVE DATE: XX/XX/XXXX | PA  DEPT DOM HR  PROC |
| PENDING PA APPROVA | COST CENTER...: XXX-XXXXXX | NO  NO  NO  NO  NO  |
+-----+-----+-----+-----+-----+-----+
REMARKS:

----- F R O M ----- D E S C ----- T O ----- PAGE : 1 OF 6
                123 | AGENCY | 123
                672 | APPROP UNIT | R312
                3230 | ORG CODE | 1234
HR PROF 2       00757 | CLASS CODE | 00756 HR PROF 1
                016 | SEAT NUMBER | 007
PERSONNEL 123-330010 | COST CENTER | XXX-XXXXXX COST CENTER NAME
PERM FULL TIME-MERT 00 | POSITION TYPE* | 00 PERM FULL TIME-MERT
EXEMPT          E | POSITION ELIG* | E EXEMPT
P-5 APPROVED    1 | FUNDING CODE* | 1 P-5 APPROVED
NOT FIELD STATUS N | FIELD STATUS* | N NOT FIELD STATUS
                1.000 | FTE | 1.000
                                * INDICATES SELECTION LIST

-----
O POS INFO L ACT LOG H HRD CPY P PROOF Y APPROVE N UNAPPROVE C CANCEL D DENY
R REMARKS S SEL LIST P1 P-1S PF7 BKWD PF8 FWD PF9 HELP PF12 RETURN CLEAR EXIT
    
```

When entering the employee's new position number, make note of the position number at the top of the reclassification M-5. HRIS will sometimes change the seat number if the seat number entered on the M-5 is already an existing position.

Pages 2 through 5 are used only if you need to set up or change any pay distributions.

```

D3325562 ACT: _      +--- POSITION CHANGE (M-5) -- +----- M-5 TYPE -----+
PRINTER:           | XXX-XXX-XXXX-XXXXX-XXX | 210 RECLASSIFY |
+-----+-----+ M-5 NUMBER....: XX-XXXX |----- APPROVED BY -----|
| M-5 STATUS      | EFFECTIVE DATE: XX/XX/XXXX | PA  DEPT DOM HR  PROC |
| PENDING PA APPROVA | COST CENTER...: XXX-XXXXXX | NO  NO  NO  NO  NO  |
+-----+-----+-----+-----+-----+-----+
REMARKS:

----- F R O M ----- D E S C ----- T O ----- PAGE: 2 OF 6
                | FISCAL YEAR (1) |
                | FUND |
                | AGENCY |
                | ORG CODE |
                | SUB ORG |
                | OBJECT |
                | ACTIVITY |
                | JOB NUMBER |
                | REPORT |
                | PERCENT |
                                * INDICATES SELECTION LIST

-----
O POS INFO L ACT LOG H HRD CPY P PROOF Y APPROVE N UNAPPROVE C CANCEL D DENY
R REMARKS S SEL LIST PF7 BACKWARD PF8 FORWARD PF9 HELP PF12 RETURN CLEAR EXIT
    
```



## Processing M-5 and P1's

Below is a handy chart to refer to when keying M-5's and if a corresponding P1 will need to also be keyed.

### When to Process a Position Change Request (M-5) or a Personnel Action (P-1)

ACTION	M-5 TYPE	P-1 TYPE
Class Code Change		
Filled	210 – Reclassify	692 – Position Reclassification
Vacant	210 – Reclassify	N/A
Class Title Change		
Filled	*(1)	741 – Change to Class Information
Vacant	*(1)	N/A
Pay Grade or Pay Plan Change		
Filled	*(1)	741 – Change to Class Information
Vacant	210 – Reclassify	N/A
Bargaining Unit Change		
Filled	*(1)	741 – Change to Class Information
Vacant	*(1)	N/A
Bargaining Eligibility Change		
Filled	210 – Reclassify	741 – Change to Class Information
Vacant	210 – Reclassify	N/A
Reclassification		
Filled	210 – Reclassify	692 – Position Reclassification
Vacant	210 – Reclassify	N/A
Cost Center Change	230 – Cost Center Change	*(2)
Field Status Change	250 – Field Status Change	N/A
FTE Change	240 – FTE Change	*(2)
Fund Percent Change	330 – Fund Percent Update	N/A
Pay Distribution Update	320 – Pay Distribution Update	*(3)
Position Added	010 – New Perm Position 020 – New Temp Position 040 – Add Emergency Non EE	N/A
Position Deleted	297 – Delete Position	N/A
Position Type Change		
Filled	220 – Position Type Change	377 – Employee Status/Condition of Employment Change
Vacant	220 – Position Type Change	N/A
Replacement Position (Overlap)	280 – Add Replacement Position	*(4)

Notes: If a dual transaction occurs, such as class code change and a pay grade change to the same position in the same pay period, the user only needs to process one M-5 type 210 Reclassify. Additionally, if a P-1 type 692 is completed for a position with a dual M-5 action occurring, a P-1 type 741 does not need to be completed.

M-5s must be approved by all parties no later than 4:30pm of the last day of the pay period to be effective the first day of that pay period. For example, the first day of a pay period is 8-16-13; therefore, the M-5 must be approved by 4:30pm on 8-29-13 to be effective for 8-16-13.

- \*(1) An M-5 is not required on this type of change. This information is contained on the classification detail screen in the HRIS Position Control module. When the administrative user updates the class information on this screen, it will automatically update the position information.
- \*(2) Whenever this type of change is done HRIS automatically updates the Employee Information record.
- \*(3) Contact DAS-SAE for assistance with pay distribution M-5s.
- \*(4) The M-5 creates a position in HRIS that has an identical payroll number to the original position. Once the incumbent vacates the original position, the system automatically moves the replacement employee into the original position and deletes the replacement position.

Note: Personnel Officers approve the M-5s at the HR Level. Pre-Audit only approves P1s at CERT/COMP Levels.