State of Wisconsin

Department of Administration

Maintain Position Data

(Single Updates)

Purpose

To update a position, either vacant or filled, within PeopleSoft, a Position Update Request Form must be completed by the Agency Position Management Specialist (AGENCY_BUDGET role), and, in some cases, approved by the agency and/or the State Budget Office.

This job aid provides direction on how to create a single position update request for existing positions in PeopleSoft, an overview on the approvals needed, and other employees you should notify when making updates.

Revised 12/01/2022

Contents

Creating a Single Position Update Request

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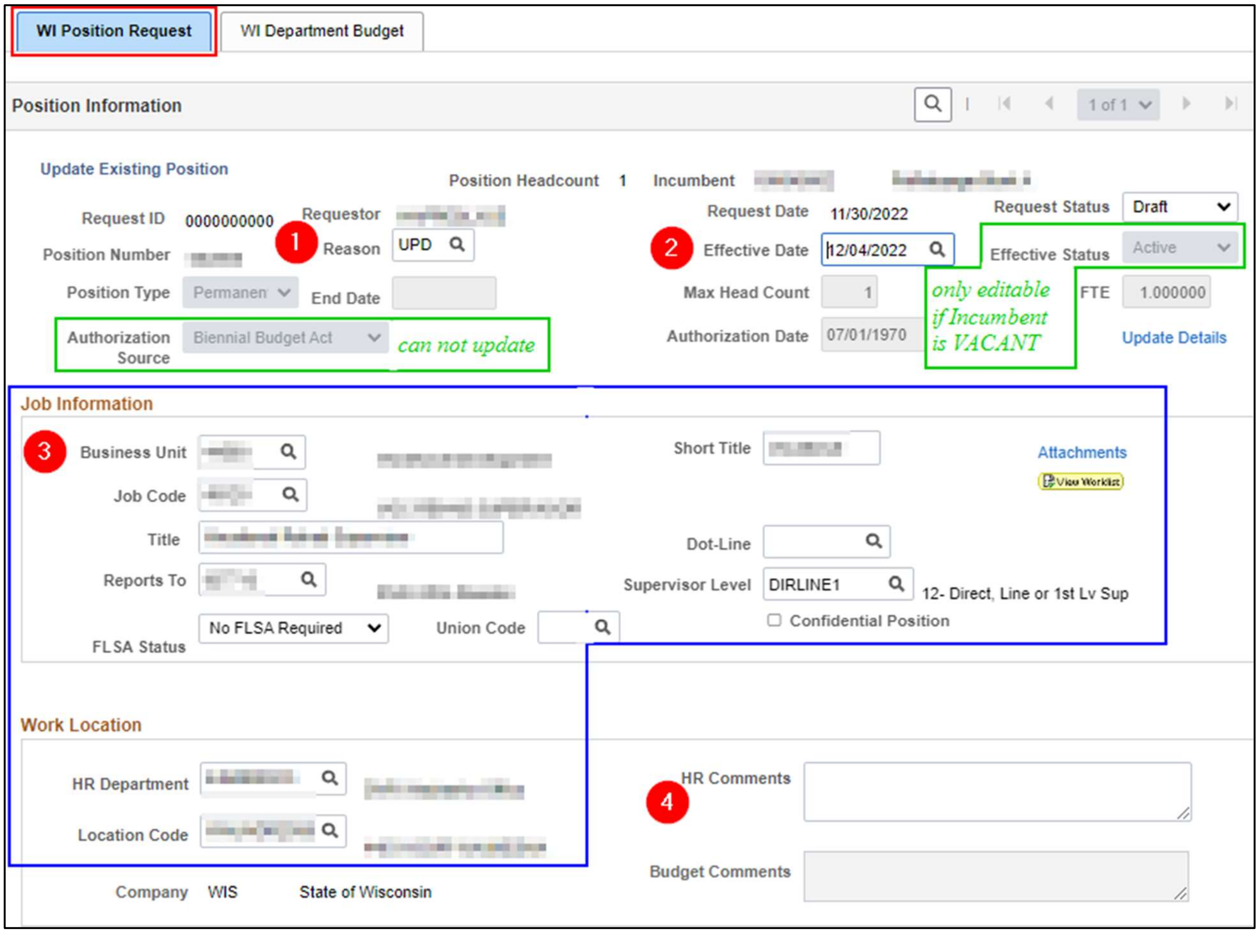
WI Position Request Home

- Enter or Search for the **Position Number** that needs to be updated
- Click **Update Existing Position**

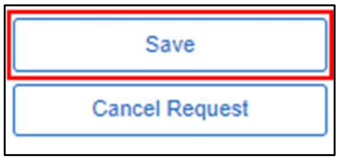


1. Update the **Reason** field to define the type of update that is being made to the position. You may refer to the Action Reason Job Aid on the DPM website.

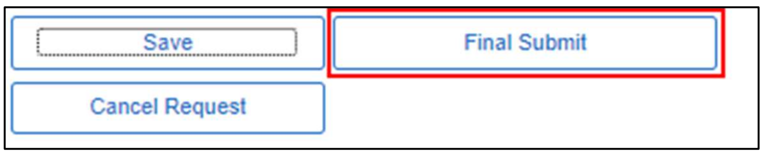
UPD is the default reason; this is not a valid value for submission. If you do not update the field to reflect the type of update you are making before clicking Submit, the system displays an invalid value pop-up error and will not allow you to submit until this field is changed.

2. Update the **Effective Date** to define when the update should take place
   - Position data can only be updated once per effective date
   - You will not be able to use an effective date that is prior to the incumbent's most current job data row and/or budget data effective date
     - Budget data effective dates can be viewed at the following navigation: Main Menu> Set Up HCM > Product Related > Commitment Accounting > Budget Information > Department Budget Table USA
     - If an effective date cannot be used, submit a JIRA ticket with the information that is changing, incumbent information and requested effective date
   - You will not be able to change the Effective Status to "inactive" if an incumbent is in the position
   - You will not be able to update the Authorization Source
3. Update fields as necessary

4. Enter a comment in the **HR Comments** box; it is required
5. Click Save to save your changes to the position



6. Click Final Submit to submit the request for approval and for the system to run error checking on the request form



Required approvals for a Position Update Request

Once an update is requested, there may or may not be approvals required, based on what kind of changes are submitted. The table below defines what approvals are required based on what fields are updated.

Field Updated	No Approval Required	Only Agency Approval Required	Agency & SBO Approval Required
Confidential Flag (CPC) **FLSA Status (FLS)** **Location Code (LOC)** **Reports To (RTC)** **Dotted-Line (UDL)** **Short Title (TTL)** **Title (TTL)** **Union Code (UNI)** **Supervisor Level (USL)**	X		
Combination Codes **Funding Distribution (FND)** **HR Department (REO)** **Job Codes (CLA, JRC, JRE, LMC)**		X	
Term Dates (TRM) **Position Type (TYP)**		X (LTEs)	X (non-LTEs)
Authorization Source **Authorization Date** **Appropriation Changes** **Business Unit** **Effective Status** **FTE (FTE)** **Max Head Count (HDC)** **Statutory Fund Changes**			X

When you update Statutory Funds, the fund code does not display what statutory fund the fund code belongs to, so you need to refer to documentation from financials to determine if the Statutory Fund has changed or not.

- If the request does not require Agency or State Budget Office approval, the position is updated in PeopleSoft (along with any applicable payroll coding), and the requestor is notified via email.
- If the request requires only Agency approval, the position update request will appear on the Position Mass Approval page for Agency approval. Once it is approved, the position is updated in PeopleSoft (along with any applicable payroll coding), and the requestor is notified via email.
- If the request requires State Budget Office approval, the State Budget Office Position Management Specialist and State Budget Office Position Management Approver must approve the request before the position can be updated and the requestor notified.

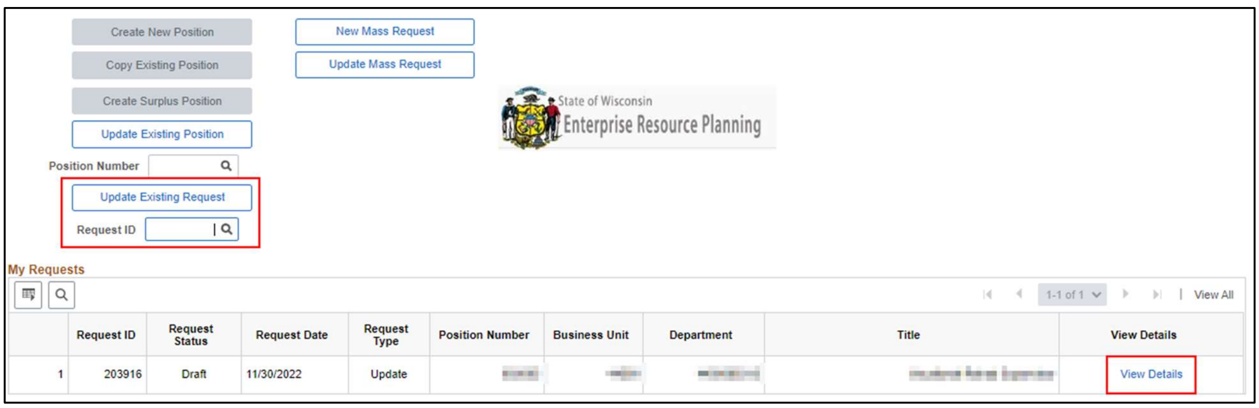
Helpful Tips

- The update form can only have one open request for a particular position at a time in order to prevent order of operations issues. To process multiple updates at once, the requestor should make all changes in a single request or submit and process each request before starting another
- When updating existing positions, changes will be applied to job data. Of note, updates to positions with incumbents should be done thoughtfully; any corrections will require a support ticket as agencies cannot modify historical data.
- Do not update the job record until the position has been updated. For example, for a reclass, do not enter the new pay rate until the position has been updated.

Canceling a Request

If you realize a submitted request is no longer needed or invalid, you may be able to cancel the request.

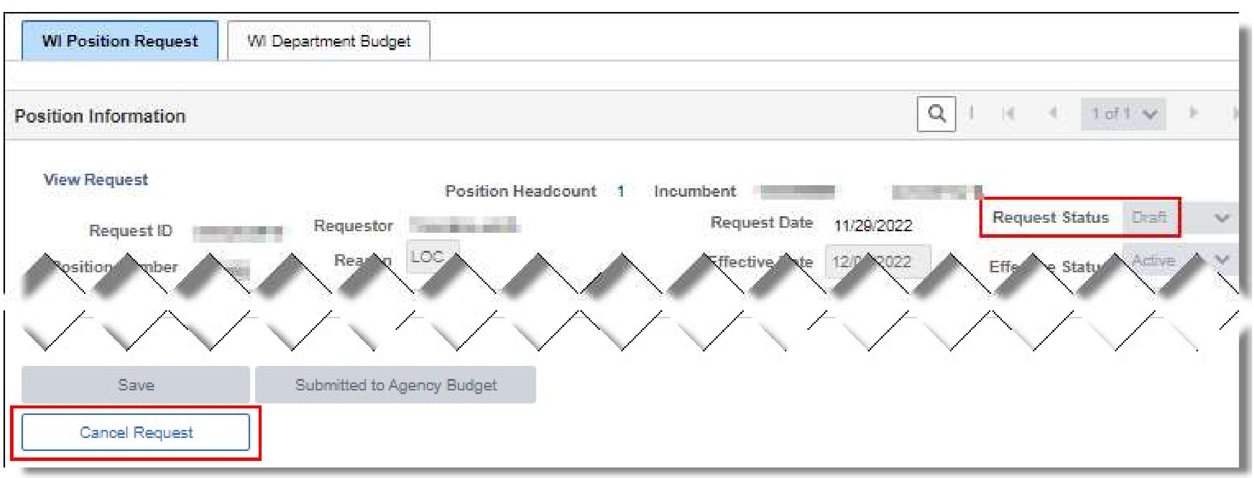
- Return to WI Position Request Home



- Enter or Search for the **Request ID** that you would like to cancel and click **Update Existing Request**

OR

- Find the Request ID under **My Requests** and click the **View Details** link



- Click the **Cancel Request** button at the bottom of the page

Downstream effects of Position Updates

Changing the job data for incumbents can have serious downstream effects, so it is important to make these updates with care. If updates to incumbent positions are made in error, a user must submit a JIRA ticket.

The following are possible downstream effects that can occur when incumbent job data is updated, along with what role should be contacted when corrective action must be taken:

Field Changed	Downstream Impact	Who To Notify
FTE	Income Continuation Insurance (ICI) Annual Benefits Base Rate needs to be updated; eligibility for the employer contribution towards health insurance may change	Payroll & Benefits Specialist
FTE	Absence Entitlements	Payroll & Benefits Specialist
Job Code	Absence Eligibility Group may need to be changed & Entitlements may need to be recalculated	HR Specialist & Payroll & Benefits Specialist
FLSA Status	Absence Eligibility Group needs to be changed & Entitlement recalculated	HR Specialist & Payroll & Benefits Specialist