

Position Reason Job Aid

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General Tips

- Using the correct Reason is important for many reasons:
 1. The State Employee Personnel Roster uses Job Data to create the official record of an employee's job history, so inaccurate reasons can lead to incorrect records.
 2. Workforce Reporting relies on data from PeopleSoft – if the data is wrong, the reporting will also be wrong, which can affect planning and decision-making.
- If you ever have a question about the most appropriate Reason to use, please contact DPM, Enterprise HR for guidance or submit a JIRA ticket to Core Human Resources.
- NEVER submit Position Change Requests to correct an error on Job or Position Data. Always submit a JIRA ticket requesting a correction.
- NEVER delete Position Data Rows even if the system allows you to. Always submit a JIRA ticket requesting a correction.
- Remember that the effective date is key to all data within PeopleSoft HCM. The effective dates from Position Data and Job Data are all dependent upon one another.

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Payroll Status = Active HR Status = Active Benefit Status = Active BAS Action = POS

Action Description = Position Change; Action Code = POS

Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Budget Only	HR Only	Used on Filled Position	Used on Vacant Position	Submission of Change Request will create Job Data Row if Filled Position	Should never be a Job Data row with this Action/Reason
Position Change	POS	New Position	NEW	Sunday, beginning of PP	Used when a new position is created. Classified Indicator options: <ul style="list-style-type: none"> • Appointed – Unclassified • Contractor • DMA Military Supervisor • Elected – Unclassified • Limited Term Employment • Other • Permanent – Classified • Project • Seasonal – Classified 	X			X		X
Position Change	POS	Add Surplus	ASU	Sunday, beginning of PP	Used when a surplus position is created. Classified Indicator options are listed below.	X			X		X

Note: Every position should either have a New Position (NEW) or Add Surplus (ASU) row once on its history, but never more than once. Using NEW or ASU on an already existing position (even if inactive) will cause the Position Request Form process to fail. If reactivating an inactive position, use [Position Status Change \(STA\)](#).

Classified Indicator definitions for Surplus Positions:

Surplus – A: Overlap, replacement, more than 3 months for on-the-job-training (includes pending retirements)
Surplus – B: Overlap, replacement, fewer than 3 months for on-the-job-training (includes pending retirements)
Surplus – C: Leave of absence replacement for appointment to unclassified service
Surplus – D: Leave of absence when authorized for fewer than 12 months
Surplus – E: Leave of absence when authorized for more than 12 months
Surplus – I: Extended illness or worker's compensation
Surplus – T: Training
Surplus – X: Hire for high turnover titles (includes training academics) or difficult-to-recruit positions

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Position Change	POS	Confidential Position Change	CPC	Sunday, beginning of PP	Used when the confidential position flag is changed. <i>Note: If a position is flagged as confidential the position data and any associated incumbent's data will not be shared through any type of data request or interface.</i>		X	X	X	Depending on the data changed on the change request this may or may not push the creation of a job data row on filled positions.	
Position Change	POS	FLSA Status Change	FLS	Sunday, beginning of PP	Used when a position's FLSA status is changed. DPM Bureau of Classification and Compensation review and approval may be required. Absence eligibility group and TRD workgroup should also be reviewed. If the absence eligibility field needs to be changed, a separate job data row for Data Change/Absence Eligibility Change must be entered to make the change. Attach documentation/approval when submitting a ticket for corrections to the FLSA status.		X	X	X	X	
Position Change	POS	FTE Change	FTE	Sunday, beginning of PP	Used when a position's FTE is changed. Review if benefits eligibility changes as a result of FTE Change (use Data Change/Benefits Eligibility Config if any updates are needed)	X		X	X	X	

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Position Change	POS	Funding	FND	Sunday, beginning of PP	Used when there are funding changes made to a position.	X		X	X	Depending on the data changed on the change request this may or may not push the creation of a job data row on filled positions.	
Position Change	POS	Job Reclassification	JRC	Sunday, beginning of PP	Used when a filled position is reclassified. Requires separate Pay Rate Change and/or Absence Eligibility Change and/or Benefits Eligibility Change sequenced job data rows on incumbent's job data, if applicable. Job code changes on vacant positions use classification change reason. Attach documentation/approval when submitting a ticket for corrections related to reclassifications. See <u>Reclassification or Reallocation</u>		X	X		X	

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Position Change	POS	Job Reallocation	JRE	Sunday, beginning of PP	Used when a filled position is reallocated. Requires separate Pay Rate Change and/or Absence Eligibility Change and/or Benefits Eligibility Change sequenced job data rows on incumbent's job data, if applicable. Job code changes on vacant positions use classification change reason. Attach documentation/approval when submitting a ticket for corrections related to reallocations. See Reclassification or Reallocation		X	X		X	
Position Change	POS	Reallocation due to Survey	SUR	Sunday, beginning of PP	<i>DPM Bureau of Classification and Compensation use only.</i> Used when a position changes as the result of a class and comp survey through BCC. Requires separate Pay Rate Change and/or Absence Eligibility Change and/or Benefits Eligibility Change sequenced job data rows on incumbent's job data, if applicable.		X	X		X	

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Position Change	POS	Classification	CLA	Sunday, beginning of PP	Used when the job code changes on a vacant position. Job code changes on filled positions use job reallocation OR job reclassification change reason. See Filled Position Transfers Instructions		X	Only for filled position transfers	X	If used for filled position transfer	X
Position Change	POS	Title Change	TTL	Sunday, beginning of PP	Used when a position's job title is changed. Mainly used for working titles. Official classification/job code changes use classification, reclassification, or reallocation change reasons.		X	X	X	X	
Position Change	POS	License/Cert/Registration	LIC	Sunday, beginning of PP	Used to add license, certification or registration requirements to a position.		X		X		X
Position Change	POS	LTE Misc Class Plan Changes	LMC	Sunday, beginning of PP	Used for changes to an LTE position that would otherwise be reclassifications or reallocations for permanent/classified employees. LTEs cannot be reallocated, so this reason is used to implement changes to these positions that are a result of class plan changes.		X	X		X	
Position Change	POS	Location Change	LOC	Sunday, beginning of PP	Used when a position's location code is changed.		X	X	X	X	

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Position Change	POS	Max Headcount	HDC	Sunday, beginning of PP	Used when the position's max headcount is changed. <i>Note: PeopleSoft HCM will not allow positions to be filled above the max headcount.</i>	X		X	X	Depending on the data changed on the change request this may or may not push the creation of a job data row on filled positions.	
Position Change	POS	Position Frozen	PFR	Sunday, beginning of PP	Used when a position is slated for inactivation but there is still an incumbent in the position.	X		X		Depending on the data changed on the change request this may or may not push the creation of a job data row on filled positions.	
Position Change	POS	Position Inactivated	INA		Used when a position is inactivated. <i>Note: Position must be vacant before using this.</i> <i>Note: Once a position is inactivated, no additional position change requests will be posted to the position until the effective status is changed back to active.</i>	X			X		X

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Position Change	POS	Position Status Change	STA	Sunday, beginning of PP	Used when reactivating an inactive position.	X			X		X
Position Change	POS	Position Type	TYP	Sunday, beginning of PP	Used when the position type is changed. Position Types (Classified Indicator): <ul style="list-style-type: none"> • Appointed – Unclassified • Contractor • DMA Military Supervisor • Elected – Unclassified • Limited Term Employment • Other • Permanent – Classified • Project • Seasonal – Classified • Surplus - T, X, A, B, C, D, E, I 	X			X		X
Position Change	POS	Reorganization	REO	Sunday, beginning of PP	Used for mass position changes as the result of reorganizations approved under s. 15.02(3) and 15.02 (4) of State Statute .*	X		X	X	X	

* Reorganization change reason: Those reorganizations are one or more of the following:

(a) creation or abolishment of a division, or the consolidation of divisions within an agency.

(b) expansion or contraction in the number of field operation units.

(c) creation, elimination of office, bureaus, or comparable subunits.

(d) transfer of an office, bureau or section which requires transfers between appropriations and (e) transfers of an office, bureau or subunit which does not require transfers between appropriations.

For reorganizations under (b), or (c) above, the approval letter from the Governor must be attached to the transaction.

For reorganizations under (c) and (d) an approval letter from the Department of Administration must be attached to the transaction.

For a reorganization under (e) the letter to the Department for information only must be attached to the transaction.

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Position Change	POS	Restructure	RES	Sunday, beginning of PP	Less formal than reorganization. Used for changing multiple data fields (e.g. Reports To, Location, etc.) on the same effective date or an HR Department change by itself. This code doesn't require State Budget Office approval.		X	X	X	X	
Position Change	POS	Request to Staff	RQS	Sunday, beginning of PP	Used when a position is being requested to staff a new job through Request to Staff process. <i>Note: Should not be used in a Position Change Request.</i>		X		X		X
Position Change	POS	Term Date	TRM	Saturday, end of PP	Used when a position's term date is changed. This is not an employee's term date.	X		X		Depending on the data changed on the change request this may or may not push the creation of a job data row on filled positions.	

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Position Change	POS	Transfer	XFR	Sunday, beginning of PP	Used when a position is transferred to another agency as a result of legislative action. This would not be used for mass transfers such as reorganizations or restructures or to move employees between positions within the same agency. A job data row for the personnel transaction (Transfer/Between Agencies) will be required to complete the move for filled positions. <i>Note: Also requires separate Pay Rate Change and/or Absence Eligibility Change and/or Benefits Eligibility Change sequenced job data rows on incumbent's job data, if applicable.</i>	X		X	X	X	
Position Change	POS	Union Change	UNI	Sunday, beginning of PP	Used when a position's union code is changed. Union Codes: • WI Law Enforcement Represented • WI Law Enforcement Non-Represented		X	X	X	X	
Position Change	POS	Update Dot-Line	UDL	Sunday, beginning of PP	Used to update the dot-line relationship of a position. This is a position number in which the position has a dot-line relationship with. <i>Note: Dot-Line does not have any system functionality. This is for agency reporting purposes only.</i>		X	X	X	X	

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Position Change	POS	Update Reports-To	RTC	Sunday, beginning of PP	Used when a position's Reports To is changed that is not a result of a formal reorganization or restructure.		X	X	X	X	
Position Change	POS	Update-Telework	RTW	Sunday, beginning of PP	Used when a position's remote work status is changed. <i>Note: When the box is checked it automatically grants access to the Remote Worker tile through ESS.</i>		X	X	X	X	
Position Change	POS	Update Supervisor Level	USL	Sunday, beginning of PP	Used to update the Supervisor Level of a position. See below for definitions of each level.		X	X	X	X	

01- Secretary/NonCab Agency Exc
02- Deputy Secretary or Equiv
03- Assistant Deputy Secretary
04- Division Administrator
05- Deputy or Asst Divis Admin
06- Bur Mgr inc Ward/Inst Dir
07- Deputy or Asst Bureau Lvl
08- Section Level Manager
09- Unit Level Supervisor 81-03 – If the employee is a supervisor in a Unit and they are at the 81-03 level they would be here; Employee supervises an organizational level unit of employees

10- Office Level Supervisor 81-03 – If the employee is a supervisor in an Office and they are at the 81-03 level they would be here; Employee supervisors a group of employees assigned to the organizational unit or office
11- Sec Lvl or Program Lvl Sup 81-03 – If the employee is a supervisor in a Section or Program and they are at the 81-03 level they would be here; Employee supervises a section or program at the 81-03 level; Example: HR Supervisor, Supervising Officer 2
12- Direct, Line or 1st Lv Sup –Employee who directly supervises a group of employees – could be 81-05, 81-04 level. Example Program Assistant Supervisor who oversees a team of program assistants/OOA; could be a lieutenant (Supervising Officer 1) who oversees Correctional Officers
13- Non-Supervisor

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Position Change	POS	Courts – Career Progression	CPR		<i>To be used by Courts ONLY.</i>						
Position Change	POS	Courts -CJ Election	CJE		<i>To be used by Courts ONLY.</i>						

Filled Position Transfers

When a filled position has changed to a degree that requires competition and an employee competes for and is hired into their same position number, the following steps are needed to enter the transaction:

1. Use position change request to update position to reflect the new classification, using the change reason of classification. If the FLSA status is also changing this should be done on this row. The effective date should be the day the transaction will be effective.
2. Process the personnel transaction on job data with the same effective date – Transfer/Within Agency.
3. Add a Pay Rate Change/Transfer job data row, if applicable
4. Add a Data Change/Absence Eligibility Change job data row, if applicable
5. Add a Data Change/Benefits Eligibility Configuration job data row, if applicable
6. Submit ticket for DPM to delete Position Change/Classification row from incumbent's job data AND manually correct position entry date

This same order of transactions may be used in some other limited circumstances when an employee needs to be moved either within the same position or between positions. Always communicate with DPM Enterprise HRIS Operations when considering using this type of transaction combination.

Personnel Transactions - Order of Operations

Reclassification or Reallocation	<ol style="list-style-type: none"> 1. Use Position Change Request to change job code. Wait for the Position Change Request to process and create a job data row. 2. If the employee is regraded with the reclass or reallocation, add a Pay Rate Change/regrade job data row to update the comp rate. 3. If the FLSA status changes with the reclass or reallocation, add a Data Change/Absence Eligibility Change job data row to update the absence eligibility. 4. If the benefits eligibility changes with the reclass or reallocation, add a Data Change/Benefits Eligibility Configuration job data row to update the Elig Flds.
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