Position Control Training

Part One

February 2011

Objectives

1. Describe what position control is and its basic function

2. Explain what a position is

3. Understand the building blocks of DEPPS

4. Choose and complete appropriate position control forms

5. Become familiar with position control/DEPPS terminology

6. Track the routing of each form

7. Navigate through the Query Position conversation in DEPPS and extract necessary information

1.   **What is Position Control?**

Position control is the process of creating and modifying positions within WSU's Departmental Payroll Personnel System (HEPPS). The Position Control Office processes position transactions. We also support the Budget Director by providing financial data analysis of salaries and positions.

2.   **What is a Position?**

A position is a specific set of duties and responsibilities and its concurrent financial resource requirements identified and assigned to a position number.

3.   **The Building Blocks of DEPPS**

EMPLOYEE

Appointment

POSITION

Assignment

ACCOUNT

4. **Forms Preparation** – In-class examples and exercises. •

- Forms can be downloaded from
  http://www.wsu.edu/~forms/forms.html;
- Step-by-step procedures can be found at
  http://www.wsu.edu/~forms/HTML/BPPM/58_Position_Cont
  rol/58.00_Contents.htm

    a.   Creating Positions
    b.   Abolishing Positions
    c.   Temporary assignment changes
    d.   Change position from permanent to temporary
    e.   Change permanent funding on position
    f.   When to use which form:

- **Position Action**

  Can be used for all changes. **Must** be used when making permanent funding changes, base value changes, allocation changes, etc.

- **Expense Assignment Action**

  Use this form whenever temporary funding changes are made. At that time you can also use this form to change the Position Identifying Description and/or the Effort Percent.

- **Position Identifying Description Change Form**

  This form is used when the only change being made is the Position Identifying Description.

5. **Terminology-** See Position Control Glossary, (pg 6)
6. **Forms Routing** – See pgs 10, 11

7.   DEPPS Navigation

QP #####   Shows position data

QP ##### APTSL   Shows appointments on the position

QP ##### ASG   Assignments

QP ##### ALCN   Allocation Adjustment Detail

QP ##### ACRL   Accrual Detail

QP ##### BASE   Base Adjustment Detail

Position Control Glossary

Account Assignment

A department assigns accounts to positions using Position Action or Expense Assignment Action forms.

Permanent assignment changes affect allocation, base, and expense accounts. Temporary assignment changes affect expense accounts only.

Appointment

A department appoints an employee to a specific position or positions. The appointment of an employee is a personnel function, and is *not* administered by Position Control

Academic Year

The nine-month period (or term) that coincides with WSU's academic school year, generally used in reference to faculty and assistants only.

Accrual

The difference between the allocation and expense for a position calculated on a pay cycle basis.

Allocation

The amount of funding permanently budgeted to a position for the current fiscal year. The allocation is adjusted for permanent changes that occur during the year.

Allocation Adjustment

A change to a position's permanent funding.

Base

> Also referred to as Permanent Budget Level (PBL). Base is similar to allocation except that base reflects the *annualized* impact of transactions that have occurred during the year, e.g., percent changes, salary changes. Base is often thought of as "next year's allocation."

Base Value or Base Rate

> The full time salary amount assigned to a position, not including stipends or differentials.

Cycle Start Date

> The date (month and day) which is the first day within a fiscal year that a specific cyclic year for a position begins.

Cyclic Year

> A period of time (or term) that is less than one full year. It is usually expressed in months, e.g., 9.50 or 10.00.

Differential/Stipend

> A compensation supplement to the base salary for specific additional duties, nonstandard work shift or nonstandard work place, e.g., shift differential, or location differential.

Expense

> The actual payroll cost for an employee for a pay period or periods. The expense account for a position is the account supporting the payroll cost of the position.

Full-Time Equivalent (FTE)

> The amount of effort associated with a position. Full-time equals 1.000 FTE and half-time equals .500 FTE

Group Position

A position that has more than one FTE associated with it. Group positions are generally used for accommodating multiple faculty or TA appointments that share a single funding source.

Home Area

A two-digit code which represents the administrative area or college to which a position primarily belongs. Positions which are shared between areas must have one designated home area which assumes administrative responsibility for the position and its maintenance.

Home Department

A four-digit code which identifies the department to which a position primarily belongs.

Job Class or Title Code

A category of duties and responsibilities as defined by WSU or the state.

Permanent Budget Level (PBL)

Funds which are allocated to a position, department or area and continue for the foreseeable future.

Perquisite

Non-monetary compensation such as University-provided housing or meals.

Position Allocation Percent

The percentage of a position supported by permanent funds.

Position Identifying Description

A descriptive identifier established by the department with a maximum of 20 characters. Normally this is the incumbent employee's name.

Position Effort Percent

The percent of FTE supported by a position. The Position Effort Percent may exceed the Position Allocation Percent but must not exceed 100% for non-group positions.

Position/Position Number

A position is a specific set of duties and responsibilities that are identified and assigned to a position number.

Skeletal Position

A new classified or administrative/professional position that is undergoing an HRS audit and does not yet have a Title Code assigned to it.

Routing of forms:

POSITION ACTIONS

```
┌─────────────────────────────┐
│   DEPARTMENT ORIGINATES     │
│          FORMS              │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│     APPROVAL BY AREA        │
│   APPOINTING AUTHORITY      │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│      POSITION CONTROL       │
│                             │
│   INPUT FORMS INTO HEPPS    │
│   FILE ORIGINALS            │
│   DISTRIBUTE PAYROLL COPIES │
└─────────────────────────────┘
```

┌──────────────────────────────────┐   ┌──────────────────────────────┐
│   HUMAN RESOURCES   │   │   SPONSORED PROGRAMS   │
│   (FOR AUDIT PURPOSES)   │   │   │
│   │   │   PROGRAMS: │
│   CIVIL SERVICE/BU/EXEMPT: │   │   11A - 14Z   │
│   **RECLASSIFICATIONS   │   │   │
│   **NEW POSITIONS   │   │   │
│   **ABOLISHMENTS   │   │   │
│   **PERM CHG IN FTE OR TERM   │   │   │
└──────────────────────────────────┘   └──────────────────────────────┘

EXPENSE ASSIGNMENT ACTIONS

```
┌──────────────────────────────┐
│   DEPARTMENT ORIGINATES       │
│   FORMS                       │
└──────────────────────────────┘
              │
              ▼
┌──────────────────────────────┐
│   APPROVAL BY AREA            │
│   APPOINTING AUTHORITY        │
└──────────────────────────────┘
```

┌──────────────────────────────┐   ┌──────────────────────────────┐
│ POSITION CONTROL   │─────────▶│ SPONSORED PROGRAMS   │
│   │   │   │
│ INPUT FORMS INTO HEPPS   │   │ PROGRAMS: │
│ FILE ORIGINALS   │◀─────────│ 11A - 14Z   │
│ DISTRIBUTE PAYROLL COPIES   │   │   │
└──────────────────────────────┘   └──────────────────────────────┘