MANAGEMENT AND BUDGET

Position Management

August 2021

Contents

Refer to SEMA4 Help for the most current SEMA4 information. This learning guide may be less current than instructions found in SEMA4 Help.

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Welcome

Welcome to the *Position Management* learning guide, part of the SEMA4 curriculum.

Who should complete this guide?

Employees who maintain current employee records, process new positions, inactivate obsolete positions, or change information on positions.

What skills will I learn?

You will develop skills, using SEMA4, to create and maintain position information. After you complete this guide, you will be able to perform the following tasks:

- View job code information
- Establish a new position in the system and enter position funding information
- View position information and put a position on hold
- Select reason codes for changes to position records
- Inactivate positions and correct position information
- Use standard reports on position management information

What do I need to know before starting?

You must have completed *SEMA4 Overview*.

How much time will this take?

Actual time will vary, but plan on approximately 4 hours and make sure you have enough time to complete this guide in one day.

What do I need to proceed?

1. Access to SEMA4
2. Training user ID and password to sign in to the User Training database
3. Code (two-digit) to access training records

How do I obtain User Training Database information?

First you must register for the course. After you do so, you will receive an email message with instructions, including a training user ID and password. Access the SEMA4 Training website for registration instructions.

Directions

Read the introduction and work through each topic, completing walk-throughs and exercises.

Follow-up

- Complete the evaluation form and send it to SEMA4 HR Services.
- Follow your agency's procedures for tracking completed training.

Introduction

SEMA4 allows you to keep track of information about a position, independently of the information about the incumbents of that position.

What is a position, anyway? A position is a group of duties and responsibilities assigned or delegated by competent authority, requiring the full-time or less than full-time employment of one person (M.S. 43A.02).

Positions may be filled or vacant. When you create a position record, SEMA4 assigns it a position number. When you hire an employee, you assign the employee to a position.

In this guide, you will learn how to use SEMA4 to view job code information, establish a new position, view position information, and select reason codes for changes to position information.

The following topics are included in this guide:

- Viewing Job Code Information
- Viewing Option and Salary Information
- Establishing a New Position
- Viewing Position Information
- Putting a Position on Hold
- Selecting Reason Codes for Changes to Position Records
- Correcting Position Information
- Using Standard Reports on Position Management Information

Continue to the next topic, *Viewing Job Code Information*.

Introduction

A job code must exist in SEMA4 before a position can be established. Creating a job code is part of the classification process. Minnesota Management & Budget sets up job codes.

Although you won't be creating job codes, you will view the job code pages. You may refer to these pages to get information about a job classification, such as Salary Plan, Grade, and Step. By the end of this topic, you will be able to view job code information.

Let's start with some definitions. Using the following terms, write the term next to its definition.

Position	Job Family	SetID	Job Function Code	Grade
Job Code	Position Number	Bargaining Unit	Salary Plan	Step

Term	Definition
	Identifies the career family associated with a job code. A career family is a group of job classes that share a common kind of work, subject matter, expertise and training and provides generally similar products and services. Example: Accounting/Audit/Fin Careers.
	A number that represents the job classification of the position. It corresponds to the classification title as listed in the State Salary Plan.
	A code identifying a matrix of hourly, monthly, and annual rates of pay, usually unique to a group of classes, such as those contained in a bargaining unit (same as Compensation Grid).
	A code used for grouping records into various categories.
	A number identifying a position.
	A group of employees in similar occupational categories, whose terms and conditions of employment are set collectively.
	The minimum and maximum rates of pay for a particular classification and any intervening steps.
	An established pay rate or point within a salary grade.
	A group of duties and responsibilities assigned or delegated by competent authority, requiring the full-time or less than full-time employment of one person (M.S. 43A.02).
	Identifies the career series associated with a job code. Example: 01B

Solution

Compare your answers to the solution below.

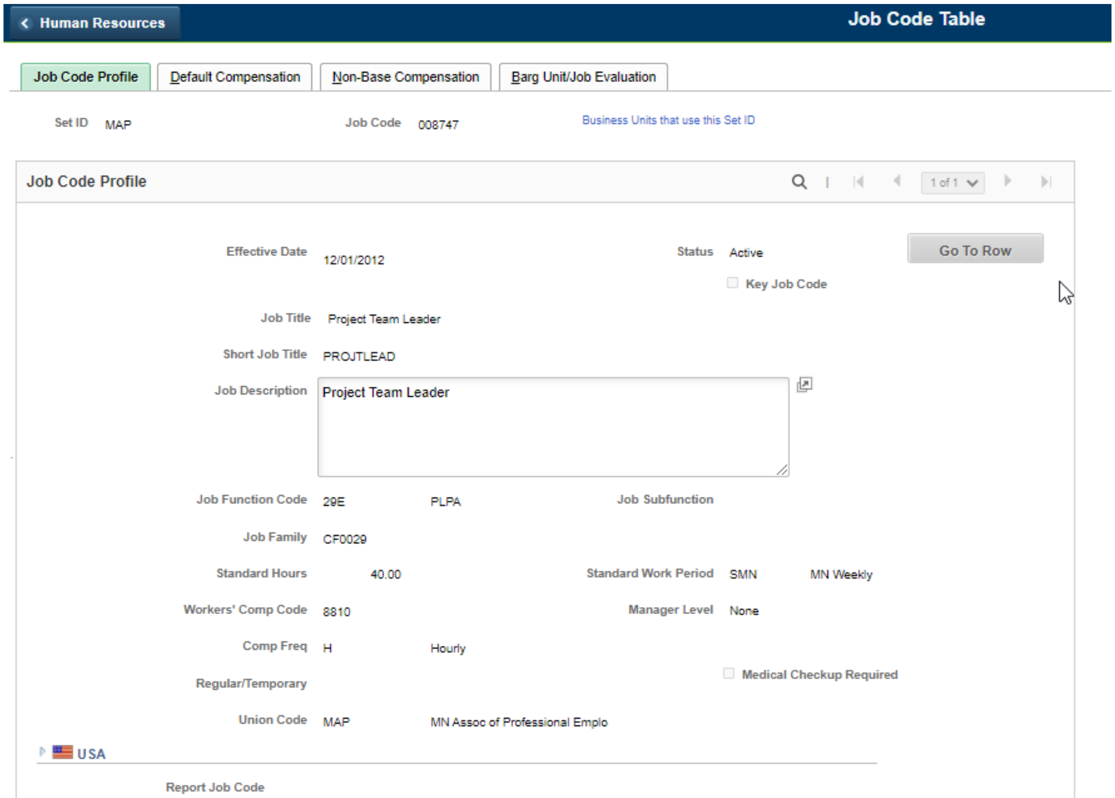
Term	Definition
Job Family	Identifies the career family associated with a job code. A career family is a group of job classes that share a common kind of work, subject matter, expertise and training and provides generally similar products and services. Example: Accounting/Audit/Fin Careers.
Job Code	A number that represents the job classification of the position. It corresponds to the classification title as listed in the State Salary Plan.
Salary Plan	A code identifying a matrix of hourly, monthly, and annual rates of pay, usually unique to a group of classes, such as those contained in a bargaining unit (same as Compensation Grid).
SetID	A code used for grouping records into various categories.
Position Number	A number identifying a position.
Bargaining Unit	A group of employees in similar occupational categories, whose terms and conditions of employment are set collectively.
Grade	The minimum and maximum rates of pay for a particular classification and any intervening steps.
Step	An established pay rate or point within a salary grade.
Position	A group of duties and responsibilities assigned or delegated by competent authority, requiring the full-time or less than full-time employment of one person (M.S. 43A.02).
Job Function Code	Identifies the career series associated with a job code. Example: 01B

View the Job Code Table – Walk-through

In the following walk-through, you will look at job code information online. You will view three pages on the **Job Code Table**:

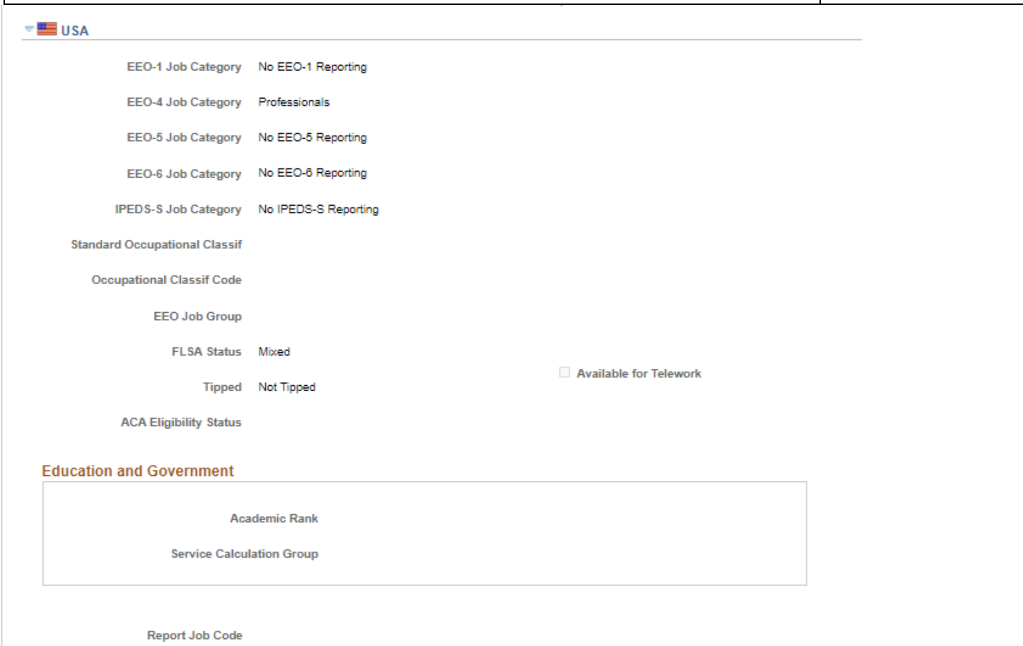
- Job Code Profile
- Default Compensation
- Barg Unit/Job Evaluation

Action	Result
1. Sign in into the **User Training** database, using the training User ID and Password.	Main Menu displays
2. Select Nav Bar: Set Up HCM > Foundation Tables > Job Attributes > Job Code Table.	Job Code Table search page displays
3. Tab down to the **Job Code** field, enter 008747 and select **Search**. • Alternatively, you can enter the title or part of the title in the **Description** field and select **Search**.	A list of search results displays
4. Select Job Code 008747 with the **MAP** SetID, from the list of search results. • Job codes can be linked to one or more than one SetID. For example, a job code can be linked to the SetIDs MAP (Minnesota Association of Professional Employees) and NUE (Non-managerial unrepresented).	**Job Code Profile** page for Project Team Leader displays
5. Review the information on the **Job Code Profile** page.	Information on this page identifies the job code and describes the job
6. In the upper right corner of the page, select **Business Units that use this Setid**. • The **Business Unit** is the Agency Code and two characters representing a bargaining unit or compensation plan to which the job code is linked. Example: B04MP for Agriculture-MAPE. • Scroll down and select **Return** to return to the **Job Code Profile** page.	A list of business units / state agencies that may use this job code display



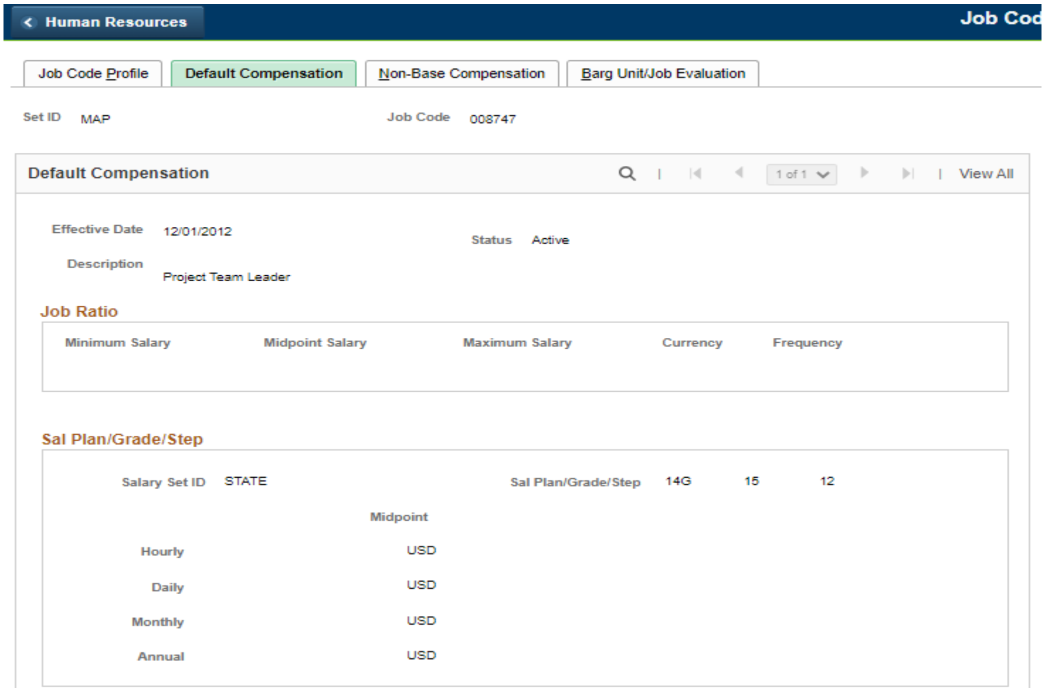
Field	Definition
SetID	SetIDs are control fields used to categorize large amounts of information. The SetID ties a job code to a bargaining unit or plan. One job code can be linked to one or many SetIDs.
Job Title	The specific title associated with a job code.
Job Function Code	Identifies the **career series** associated with a job code. Example: 01B. A career series is a group of job classes within a career family that form a logical and unique career path. For example, Auditing is a career series within the Accounting/Audit/Fin Careers career family.
Job Family	Identifies the **career family** associated with this job code. A career family is a group of job classes that share a common kind of work, subject matter, expertise and training and provides generally similar products and services. For example, Accounting/Audit/Fin Careers.

Action	Result
• Select the USA flag button. Review this data.	EEO and FLSA information displays



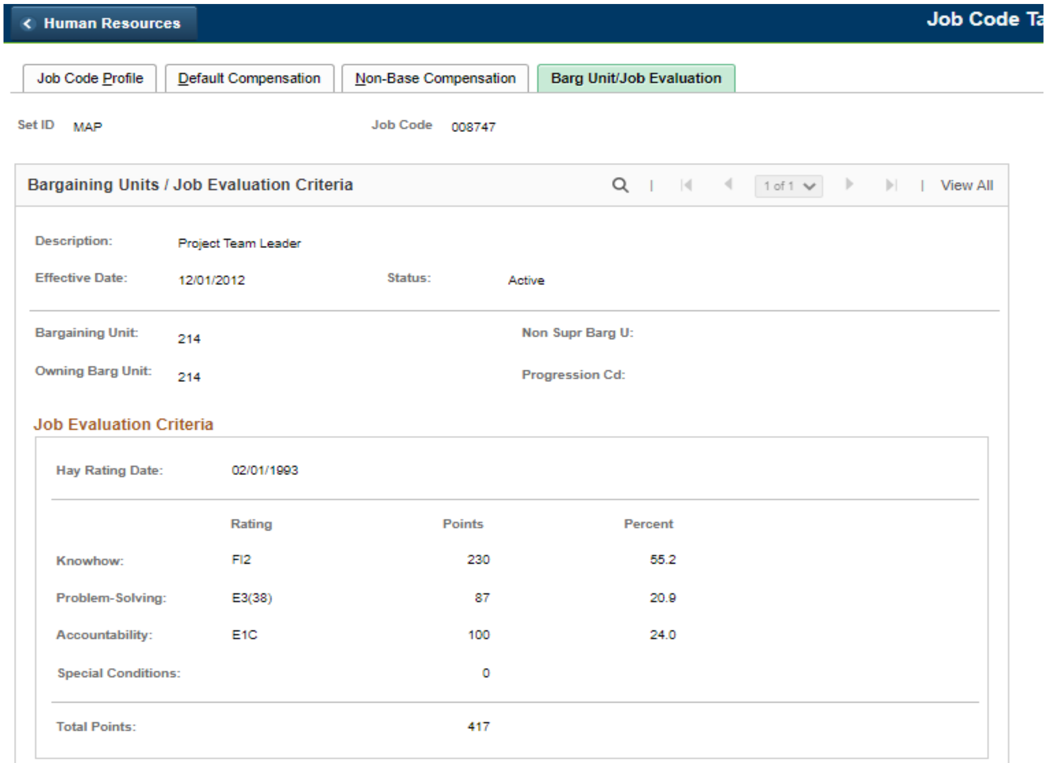
Field	Definition
EEO-4 Job Category	Identifies an employment group (such as professional, technicians and office/clerical) as defined by the federal EEOC.
FLSA Status	Identifies the Fair Labor Standards Act status for the Job Code. This value will fill in on the position record. On the position record, you can change the value that fills in, unless it is "Nonexempt." If the value that fills in is "Mixed," you *must* change it.
Tipped	Set to Not Tipped. This field is applicable to companies that have employees who receive tips.

Select the **Default Compensation** page.



Field	Definition
Salary SetID	A code used for grouping records into categories (on the Job Code Table it is always STATE).
Sal Plan	A code identifying a matrix of hourly, monthly, and annual rates of pay, usually unique to a group of classes, such as those contained in a bargaining unit (most contracts or plans refer to this as the Compensation Grid). MAPE example: 14G
Grade	The minimum and maximum rates of pay for a particular classification and any intervening steps. In contracts, it's the Comp Code number.
Step	The maximum step assigned to the job code. The number of steps in the range, grade or comp code for this job code.

Select the **Barg Unit/Job Evaluation** page.



Field	Definition
Bargaining Unit	A group of employees in similar occupational categories, whose terms and conditions of employment are set collectively. Example: 214 identifies MAPE
Owning Barg Unit	The bargaining unit the job code would be assigned to, if it were represented. Examples: The owner of a bargaining unit for Accounting Officer Series would be 214 (MAPE).
Hay Rating Date	The date a job code is Hay rated.
Knowhow (rating and points)	In the Hay rating of a job class, the amount of knowhow required by the job and the number of points for that rating.
Problem Solving	In the Hay rating of a job class, a measurement of problem solving required by the job and the number of points for that rating.
Accountability	In the Hay rating of a job class, the amount of accountability required by the job and the number of points for that rating.
Special Conditions	In the Hay rating of a job class, the special conditions of the job and the number of points for that rating.

View the Job Code Option Table – Walk-through

The **Job Code Option Table** contains the options associated with a specific job code. Options are areas of specialization.

Action	Result
1. Select Nav Bar: SetUp HCM > Foundation Tables > Job Attributes > Job Code Option Table.	The search page displays.
2. Tab to the Job Code field, enter 008747 and select **Search**.	A list of search results displays
3. Select Job Code 008747 with the MAP SetID, from the list of search results. View the **Job Code Options** page.	**Job Code Options** page displays

Field	Definition
Option Code	A code that identifies a group of jobs within a job classification that requires specialized knowledge, skills and abilities not seen in other positions within the classification.
Exam Option	There are two types of options: exam and class. If this check box is selected, then this option is an *exam* option. If it is not selected, then this option is a *class* option.

View Salary Grades and Steps – Walk-through

When you establish a new position, you may need to view the salary grade and steps.

Action	Result
1. Select Nav Bar: Set Up HCM > Product Related > Compensation > Base Compensation > Salary Grades.	The search page displays
2. In the **SetID** field, select STATE from the lookup. In the **Salary Administration Plan** field, choose 14G. Select **Search**.	List of Plans and Grades displays
3. Select **Salary Grade** 15. View the information.	**Salary Grade Table** page displays
4. Select **Salary Step Components**.	**Salary Step Components** page displays
5. Select the right arrow button to view each step's data.	Salary components display
6. Select **Home** at the top of the page.	Main Menu displays

Review Questions

To review what you have learned, answer the following questions. If you have difficulty answering the questions, review the topic.

1. Suppose that a month from now, you want to look up information about a job code, but you need to review how to find it. Where should you look?

   ____

2. To access Job Code information, you select Set Up HCM, and then you select which sub-menu?

   a. Payroll Setup
   b. Compensation Rules
   c. Foundation Tables
   d. Product Related

Check your answers on the next page.

Review Answers

Check your answers to the review questions.

1. Suppose that a month from now, you want to look up information about a job code, but you need to review how to find it. Where should you look?

   SEMA4 Help

2. To access Job Code information, you select Set Up HCM, and then you select which sub-menu?

   c. Foundation Tables

Continue to the next topic, *Establishing a New Position*.

Introduction

Have you ever established a new position? Here are some of the tasks involved:

- Review position management policies and procedures (see SEMA4 Help).
- Conduct a job audit if it's a delegated class, or request a job audit from Minnesota Management & Budget.
- Receive a job class notification from Minnesota Management & Budget, or assign a job classification if delegated.
- Enter the position information in SEMA4.

When a new position needs to be created, a new position record is established in SEMA4. You might create a position in order to meet organizational needs or to staff a new project.

Before entering data in the system, be sure you have the check list from SEMA4 Help, all the information about the position ready, and enough time to enter the entire record. It may be helpful to print out an existing position record so you'll know what kind of information you need to have ready to enter.

Follow the policies and procedures of the State and your agency. Position management policies and procedures are documented in SEMA4 Help.

By the end of this topic, you will be able to establish a new position by entering new position and funding information into the system. SEMA4 has some features that make establishing a new position easy for you!

- The process for entering each kind of change to a position record is documented in a check list. There is a check list for each action and reason code combination. Each check list contains links to step-by-step instructions and references. The check list tells you how the action and reason code can affect benefits eligibility.
- Much of the information you need fills in from the job code, option and salary tables – you don't need to type all the data yourself.
- Some fields have drop-down lists, which contain valid values to select.
- Date fields can be entered by selecting a calendar button.
- For fields that have a large number of possible selections, select the lookup button, which resembles a magnifying glass, to access the lookup page. Enter all or part of any field, select **Look Up**, and a list will display.

View SEMA4 Help

Complete the following steps to look up the policy and procedures and step-by-step instructions in SEMA4 Help.

Before beginning any transaction, refer to SEMA4 Help to find:

- Policies and procedures
- Check lists
- Step-by step instructions
- References

Action	Result
1. Access SEMA4 Help.	SEMA4 Help Contents displays
2. Select **HR/Payroll Functions**.	A list of HR/Payroll Functions displays
3. Select **Position Management**.	Position Management – Contents displays
4. Select **Check Lists**.	Position Change - Reason Codes display
5. Scroll down and select **New Position (NEW)**.	Position Change – New Position – Check List displays
6. Select **Allocation of a New or Reclassification of a Vacant Position Operating Policy and Procedure**.	Allocation of a New or Reclassification of a Vacant Position - Operating Policy and Procedure displays
7. Select **Policy**. • Read the policy.	Allocation of a New or Reclassification of a Vacant Position – Policy displays
8. Select your browser's Back button to return to the previous page. Then, select one of the procedures listed, such as **Agencies WITHOUT Delegated Authority**. • Read the procedure.	Allocation of a New or Reclassification of a Vacant Position – Agencies WITHOUT Delegated Authority - Procedure displays

Action	Result
9. Select your browser's Back button twice.	The Position Change – New Position – Check List displays
10. Select **Add a New Position to SEMA4**.	Adding a New Position – Tasks displays
11. Select **Adding a New Position**.	Add/Update a Position – Steps displays
12. Scroll down and notice that there are several pages to complete in the position data component.	
13. Notice that the step-by-step instructions include links to references, such as the *Valid Reg/Temp and Classified Indc Field Combinations - Reference*.	
14. Select your browser's Back button several times to return to the Position Management – Contents page.	Position Management – Contents displays
15. Select **Reference**.	A list of references displays
16. Scroll down and select the following references, and print them using your browser's print button. • Position - Valid Reg/Temp and Classified Indc Field Combinations • Unclassified Authorization Codes • WCRA Code Guide Another easy way to find these references is via links within the Add/Update a Position step-by-step instructions.	References print

Establish a New Position – Walk-through

In this walk-through, you will establish a new position.

Assume that a new project has started. To meet staffing needs for this project, you must create a position for a Project Team Leader.

The job code for this new position is 008747. This is the job code that you viewed in the previous topic.

Keep these references handy, which you printed earlier:

- Position - Valid Reg/Temp and Classified Indc Field Combinations - Reference
- Unclassified Authorization Codes - Reference
- WCRA Code Guide - Reference

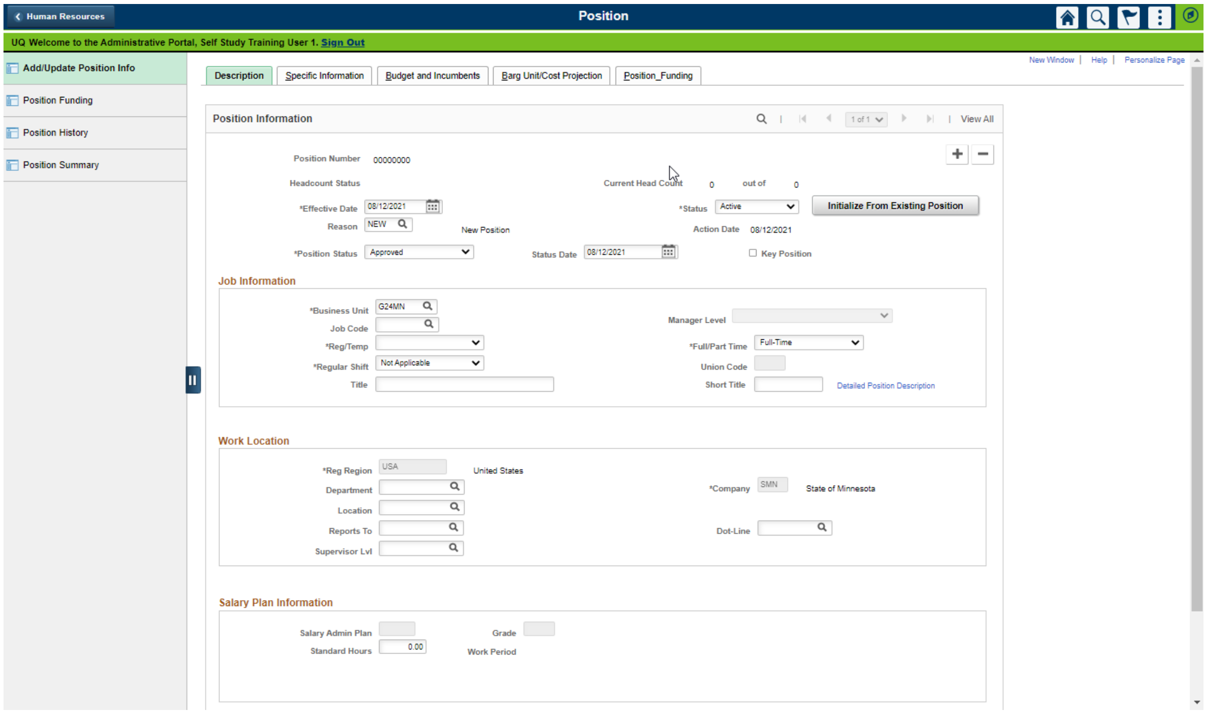
Action	Result
1. Select SEMA4 > Human Resources > Position > Add/Update Position Info.	Add/Update Position Info search page displays
2. Select the **Add a New Value** tab.	
3. When this message “Position Number will be automatically assigned when you save” displays: • Select **OK**. • The position number first displays as 00000000. The actual position number will appear after you save.	Position Data component displays

You must complete all the system-required fields on the Position Data pages to create a position record.

Many of the fields in the Position Data component fill in automatically from the job code and other tables. You can type over the information in some of these fields.

Do not select **Save** until you complete all pages in the component. If you save the record too soon, an error message will tell you to complete all required fields, and the empty required fields will turn red.

Before starting to add a new position, make sure you have collected all the information you need, and you have enough time to enter it. Begin with the **Description** page.



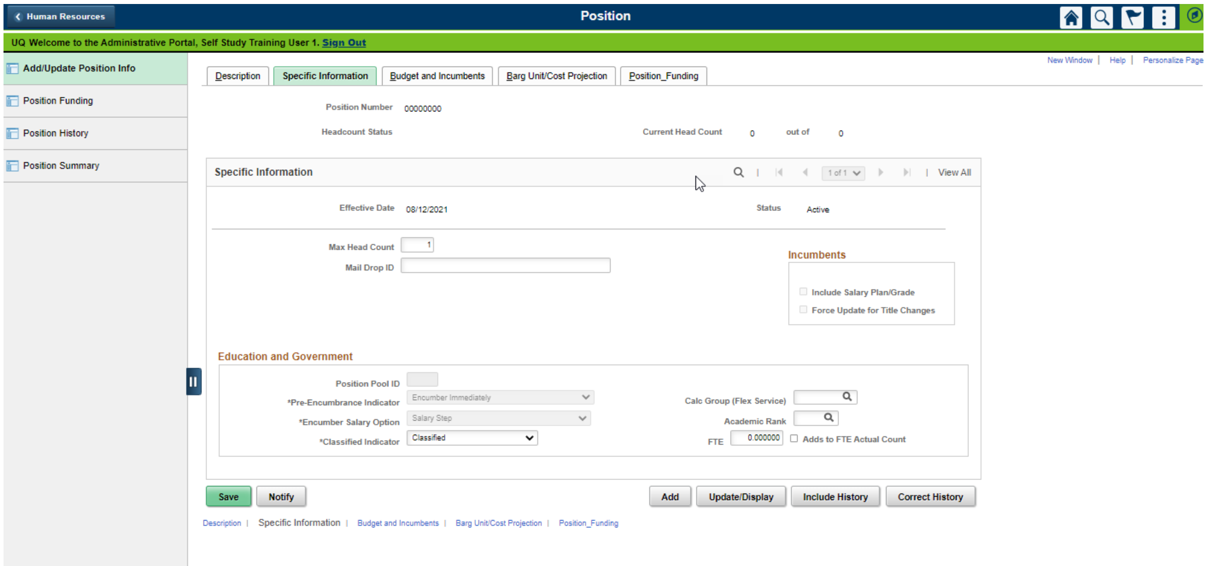
Field Name & Description	Data
1. Effective Date • Accept the default value (today's date) or enter the date the position takes effect. • Notice that the Action Date field displays the date the action was entered.	For this example, pick a date from last week
2. Status • Defaults to Active when creating a position.	Active
3. Reason • The reason for the position record. The default value is NEW - New Position. • You may accept this; or select the look up button to display the Look Up Reason page, and select **Look Up** to display a list of reason codes.	Because this is a new position, accept the default, NEW The description displays to the right of the reason code
4. Position Status • Indicates if the position is abolished, approved or On Hold.	Approved

Field Name & Description	Data
5. Status Date • The date the position status is effective.	Accept the default
6. Key Position • Skip this field.	
7. Business Unit • Accept the default, or select a business unit for this position. • The business unit format is agency code followed by two characters representing a bargaining agreement or compensation plan. Example: B04MP for Department of Agriculture, MAPE.	B04MP
8. Job Code • Enter the job code associated with this position, or select a job code, and press **Tab**. If you select the look up button to get the Look Up Job Code page, it does not include the value you need. To narrow the list, complete or partially complete at least one lookup field before selecting **Look Up**.	008747
9. Manager Level • Accept the default or select the appropriate value.	Accept default, None
10. Reg/Temp • For valid values, refer to the *Position – Valid Reg/Temp and Classified Indc Field Combinations – Reference* in SEMA4 Help. • Accept the default, or select the drop-down list to select the value that indicates the implied length of time of the appointment.	Limited
11. Full/Part Time • Accept the default value, or select the value indicating whether the position requires full-time, intermittent, or part-time hours.	Accept default, Full-Time

Field Name & Description	Data
12. Regular Shift • Accept the default value or select another value.	Accept default, Not Applicable
13. Union Code, Salary Admin Plan and Grade • Data fills in from job code and salary tables.	
14. Title • Either accept the default (the job code title), or enter a working title. • This title will display in the Business Title field of the incumbent's employment data.	Team Leader, Special Projects
15. Short Title • If you want a title other than the default, enter it.	Accept default
16. Detailed Position Description • If you want to enter a more detailed description, select the link.	Skip
17. Department • Enter or select the Department ID associated with the position, and press **Tab**. • In SEMA4, a Department is a code that identifies an organizational entity, such as a department, division, or work group.	B046520 for Agricultural Statistics
18. Location • Accept the default, or enter or select the location associated with the position.	Accept default

Field Name & Description	Data
19. Reports To • Enter or select the position number of the supervisor for this position. The supervisor position title displays to the right. • This data is used to produce the performance appraisal notification reports, and is used by the Enterprise Learning Management (ELM) system to send training enrollment approvals to the employee's supervisor.	00000016
20. Dot-Line • Enter or select the position number of the dotted-line supervisor (if there is one).	Leave blank
21. Supervisor Lvl	Skip
22. Standard Hours • Enter the correct number of working hours per week.	Accept default, 40.00
23. Work Period, Update On and Updated By	Accept default

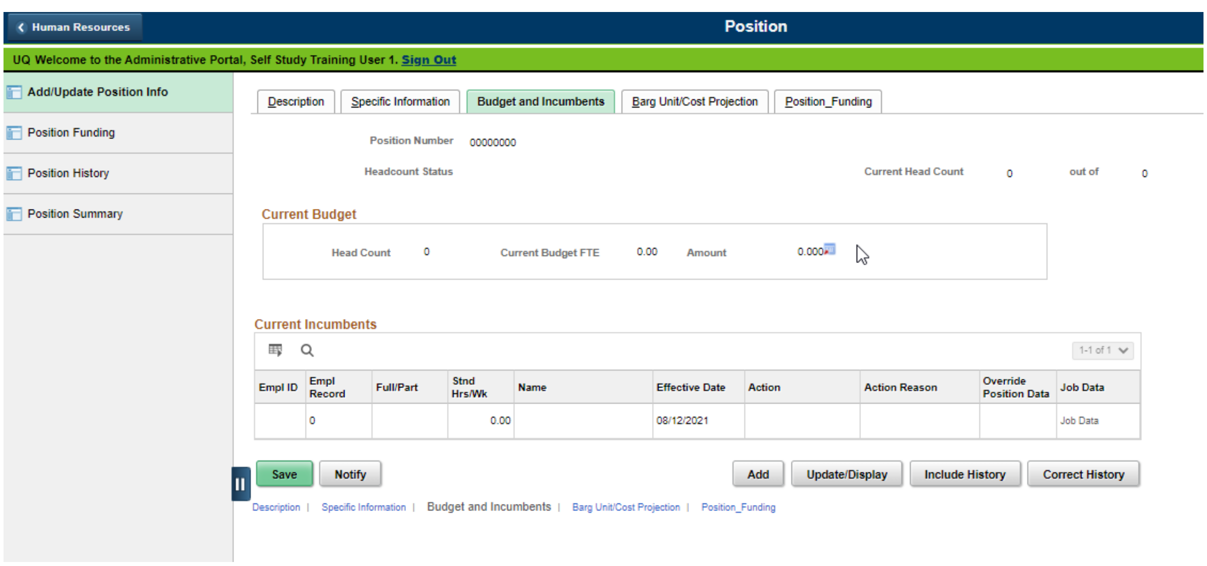
Select the **Specific Information** page.



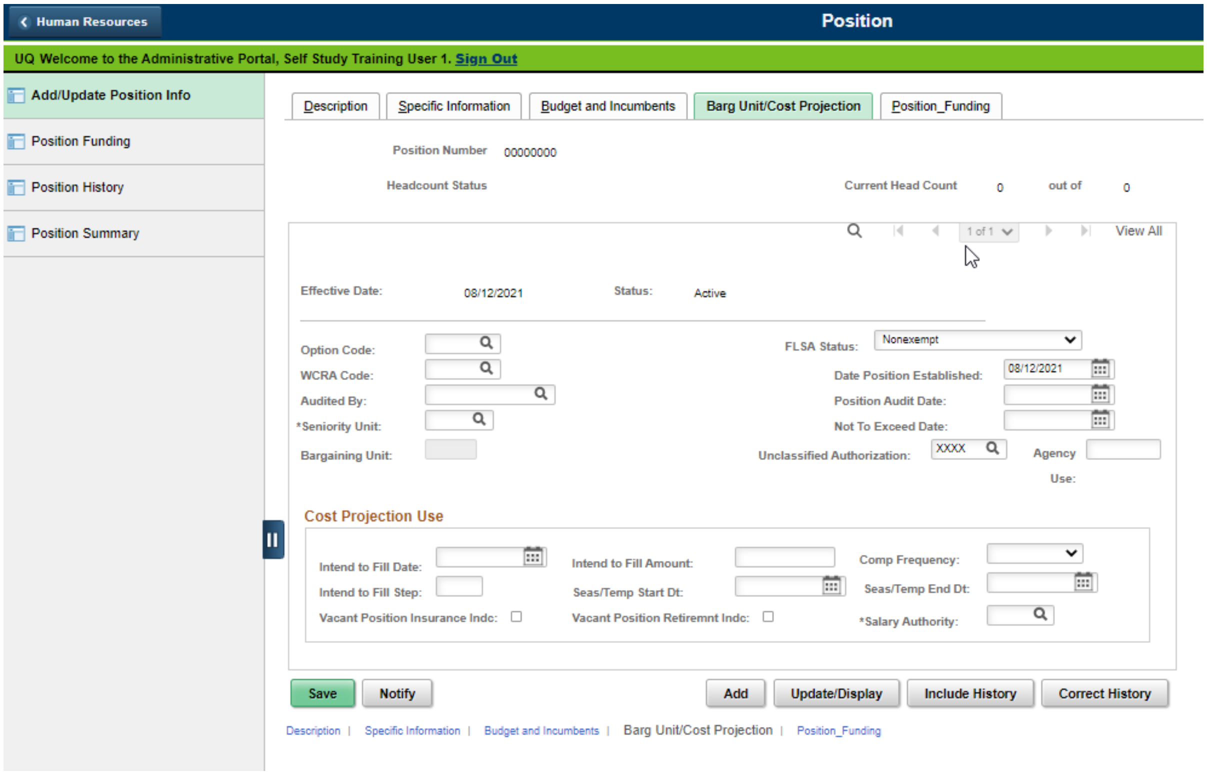
Field Name & Description	Data
1. Max Head Count • Accept the value of 1, or enter the number of employees you can have in this position.	Accept default
2. Mail Drop ID • Enter the mail drop of the position, if any.	Leave blank
3. Include Salary Plan/Grade	Leave blank
4. Position Pool ID, Pre-Encumbrance Indicator, and Encumber Salary Option have default values that cannot be changed.	
5. Calc Group (Flex Service) • Use only if your agency tracks flexible service. Select an appropriate service calculation group.	Leave blank
6. Academic Rank is for faculty positions only. • Enter the rank or select an appropriate value.	Leave blank

Field Name & Description	Data
7. Classified Indicator • For valid values, refer to the *Position - Valid Reg/Temp and Classified Indc Field Combinations - Reference* in SEMA4 Help. • Accept the default value or select another value. (If the default is Unclassified, you can change the value to Non-Status but not to Classified.) • Indicates whether the position is Classified, Unclassified or Non-Status.	Unclassifd
8. FTE • Enter the percentage of full-time (maximum of 1.00). A full-time position has an FTE of 1.00. A half-time position may have an FTE of .50.	1
9. Adds to FTE Actual Count • Skip this field.	Leave blank

On the **Budget and Incumbents** page, you may view current incumbent information for a position or select **View All** to display incumbent history. Because you are adding a new position at this time, there will be no incumbent data. For filled positions, you are able "jump" to the job record for the current or former incumbent by selecting the **Job Data** link.



Select the **Barg Unit/Cost Projection** page.



Field Name & Description	Data
1. Option Code • Enter or select the option code that is associated with this position, if any. • Identifies a group of jobs within a job classification that require specialized knowledge, skills and abilities.	Leave blank
2. FLSA Status • Data fills in from the Job Code table. • You can change the value that fills in, unless it is "Nonexempt." If the value that fills in is "Mixed," you *must* change it. • Some of the FLSA Status values end in FST (Failed Salary Test). This means the duties test for exempt status has been met, but the salary test has not been met. Employees in positions with this code should be paid overtime at the 1.5 rate.	Nonexempt

Field Name & Description	Data
3. WCRA Code • Select an appropriate value. • If you need help to determine a WCRA code, refer to the *WCRA Code Guide Reference* in SEMA4 Help. • This code, used for workers compensation, identifies the risk of the position, and defaults from the Job Code table.	Accept default
4. Date Position Established • Defaults to today's date.	Accept default
5. Audited By • If this position has been audited, enter the employee ID of the auditor.	Leave blank
6. Position Audit Date • If the position has been audited, enter the date it was last audited.	Leave blank
7. Seniority Unit • Select the appropriate value. • A seniority unit is an agency, or part of an agency, for which seniority rights are specified in a collective bargaining agreement or plan.	014
8. Not to Exceed Date • If this position has a scheduled end date, enter the ending date. Leave the field blank if the position is ongoing. • If the Reg/Temp field on the Description page is set to Limited, enter the date the position is scheduled to end.	For this example, enter the last day of next year
9. Bargaining Unit • Defaults from the Job Code table and cannot be changed.	Accept default

Field Name & Description	Data
10. Unclassified Authorization • If the position is *unclassified* (the value in the Classified Indicator field on the Specific Information page is Unclassified), select the lookup button, and choose the value indicating why the position is unclassified. Do not select XXXX. • If the position is *not* unclassified (the value in the Classified Indicator field on the Specific Information page is Classified or Non-Status), accept the default value of XXXX. *Exception:* Minnesota State academic Exam Monitors should be non-status and have an unclassified authorization of OXXX. • If a position can be associated with both 43A.08 and agency enabling legislation, use the applicable 43A.08 code. • For more information, refer to the *Unclassified Authorization Codes – Reference*. To find this reference, access SEMA4 Help, select Index, and look up Unclassified Authorization Codes. • This field determines if the wage information of the position's incumbents will be sent to the Department of Employment and Economic Development for unemployment insurance purposes. If the wrong data is entered, the incumbents will face significant problems when separating from state service.	TUNC
11. Agency Use • Enter an agency-specific code (up to seven characters), or leave it blank. For example, agencies may assign codes to position records, to group them for reporting purposes. Contact your agency Human Resources office to find out if this field is used by your agency. • Letters, numbers, and symbols can be entered. Lower case letters are converted to upper case automatically. Agencies can use this free-form seven-character field as they wish. For example, agencies may assign codes to position records, to group them for reporting purposes. Completing this field is optional. Data in this field does not fill in on the incumbent's record.	B04X000

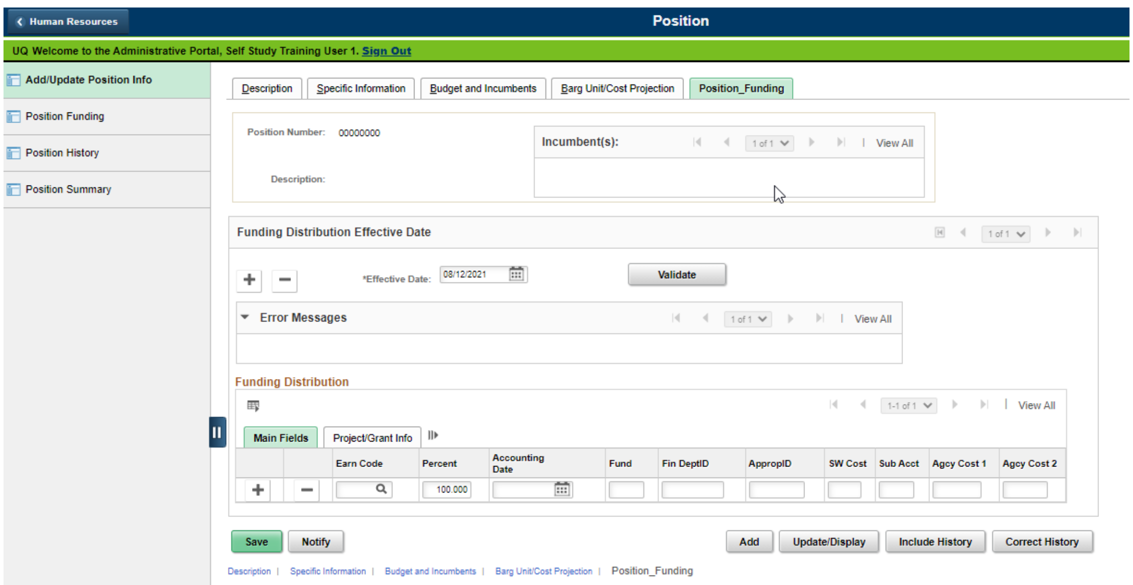
If the position you are creating will be vacant for a period of time, but you want to include it in cost projections, complete the Cost Projection Use section.

Field Name & Description	Data
12. Intend to Fill Date • Enter the date this position is anticipated to be filled. Note: Vacant positions will have cost projections only when this field is completed.	For this example, pick a date next month
13. Intend to Fill Amount • If this position is set up for a salary range that does *not* have steps, enter the appropriate amount.	Leave blank
14. Comp Frequency • Enter or select the frequency of compensation applicable to the Intend to Fill Amount you entered.	Leave blank
15. Intend to Fill Step • If the salary range has steps, enter the step for this position. This is used to calculate cost projections.	1
16. Seas/Temp Start Dt and Seas/Temp End Dt • If this position is seasonal or temporary, enter the expected start date and the expected end date. These dates are used to calculate cost projections for seasonal positions.	Leave blank
17. Vacant Position Insurance Indc • Select check box if you want insurance costs to be calculated in cost projections for this vacant position which has an Intend to Fill Date.	Leave blank
18. Vacant Position Retirement Indc • Select check box if you want retirement costs to be calculated in cost projections for this vacant position which has an Intend to Fill Date.	Leave blank

Field Name & Description	Data
19. Salary Authority • Enter or select the salary authority code for this position. • Identifies the contract or plan that covers the terms and conditions of employment for this position.	MAP

When you are adding a new position in SEMA4, the **Position Funding** tab is included in the Position Data component. Tip: To access position funding information after creating a new position, you will select the Position Funding component rather than Position Data.

Select the **Position Funding** page. The funding information entered on this page will default to labor distribution and business expense pages.



Field Name & Description	Data
1. Effective Date • Accept the default value, or enter the date you want the funding to become effective.	Accept the default

Field Name & Description	Data
2. Earn Code • All agencies are required to set up a blank earning code record with a valid account. Some agencies require that specified earn code(s) be set up with a different account. In addition, some agencies require that a TVL earning code be set up with an account that will default for all business expenses.	Leave blank
3. Percent • Enter the percentage of time that is to be charged to the earning code. Valid entries are .001 - 100 percent.	Accept default, 100.000
4. Accounting Date • Leave blank unless the account for the position is a continuing appropriation.	Leave blank
5. Fund • Enter the four-character fund number that is funding this position.	100
6. Fin DeptID • Enter the eight-character financial department ID funding this position.	G102100
7. AppropID • Enter the seven-character appropriation ID funding this position	020
8. SW Cost • Enter the four-character statewide cost, if appropriate.	Leave blank
9. Sub Acct • Enter the four-character sub account, if appropriate.	Leave blank

Field Name & Description	Data
10. Agcy Cost 1 • Enter the five-character agency cost 1, if appropriate.	Leave blank
11. Agcy Cost 2 • Enter the five-character agency cost 2, if appropriate.	Leave blank
12. Select the **Project/Grant Info** grid tab.	
13. PC Bus Unit • Enter the five-character PC business unit, if appropriate.	Leave blank
14. Project • Enter the up to fifteen-character project, if appropriate.	Leave blank
15. Activity • Enter the up to fifteen-character activity ID, if appropriate.	Leave blank
16. Source Type • Enter the five-character source type, if appropriate.	Leave blank
17. Category • Enter the five-character category, if appropriate.	Leave blank
18. Sub Category • Enter the five-character sub category, if appropriate.	Leave blank
19. Select the **Main Fields** grid tab.	

Action	Result
1. Review the information you just entered. If you need to add another row of funding information, select the plus sign button next to Earn Code.	Don’t add another row of funding
2. Select **Save**. • If an error message displays, fix the error.	*Saved* displays briefly in the upper-right corner
3. Select the **Validate** button after saving.	*Validation Processing* displays
4. Select the **Check Progress** button every few seconds until the validation is complete. In the User Training database, select it a few times for practice, and ignore any error messages that may display. (*In the real system, if error messages display, fix the information according to the error messages. Repeat the save/validate/check progress until you receive no errors*.)	
5. Select **Home**.	Main Menu displays

Establish a New Position – Exercise

In this exercise, you will access SEMA4 Help and establish a new position.

Resources

You may use these resources in completing this exercise:

- The step-by-step instructions and screen prints in the walk-through
- SEMA4 Help

Directions

To meet staffing needs, a new Personnel Officer position must be created. A supervisor met with you to discuss the position and you received approval to establish a new position for a personnel officer. Create this position in SEMA4.

Action	Result
1. Select SEMA4 > Human Resources > Position > Add/Update Position Info.	**Add/Update Position Info** page displays
2. Select **Add a New Value**.	A message displays
3. Select **OK**.	**Description** page displays

Field Name	Data
Effective Date	For this example, pick a date from next week
Status	Active
Reason	NEW
Position Status	Approved
Status Date	Accept default
Key Position	Skip
Business Unit	H55NU
Job Code	001399
Manager Level	None

Field Name	Data
Reg/Temp	Unlimited
Full/Part Time	Full-Time
Regular Shift	N/A or Not Applicable
Title (on the Description page)	Safety & Health Specialist
Short Title	Accept default
Department	H558171
Location	Accept default
Reports To	00000010
Standard Hours	40.00
Max Head Count	1
Mail Drop ID	Leave blank
Classified Indc	Classified
FTE	1
Option Code	Leave blank
FLSA Status	Nonexempt
WCRA Code	Accept default
Date Position Established	Accept default
Seniority Unit	017
Not To Exceed Date	Leave blank
Unclassified Authorization	XXXX
Agency Use	H558100
Intend to Fill Date	For this example, pick a date from next month
Intend to Fill Amount	25.00

Field Name	Data
Comp Frequency	Hourly
Salary Authority	NUE
Effective Date	Accept the default
Earn Code	Leave blank
Percent	100.000
Accounting Date	Leave blank
Fund	100
Fin DeptID	G104500
ApropID	040

Action	Result
1. Select **Save**. If an error message displays, fix the error.	Record saves
2. Select the **Validate** button after saving.	*Validation Processing* displays
3. Select the **Check Progress** button every few seconds until the validation is complete. In the User Training database, select it a few times for practice, and ignore any error messages that may display. (*In the real system, if error messages display, fix the information according to the error messages. Repeat the save/validate/check progress until you receive no errors*.)	
4. Select **Home**.	Main Menu displays

Review Questions

To review what you have learned, answer the following questions. If you have difficulty answering the questions, review the topic.

1. To create a new position, what do you select from the main menu?

    a. Workforce Administration
    b. Workforce Development
    c. Position
    d. Workforce Monitoring

2. Before entering data, make sure you have:

    a. Check List from SEMA4 Help
    b. Information ready to enter
    c. Enough time to enter the entire record
    d. All of the above

3. The Reports To data is used to produce the performance appraisal notification reports, and is used by the _____________ _____________ ______________ (ELM) system to send training enrollment approvals to the employee's supervisor.

4. What is true about the FLSA Status field, on the Barg Unit/Cost Projection page?

    a. Data fills in from the Job Code Table.
    b. You can change the value that fills in, unless it is "Nonexempt."
    c. If the value that fills in is "Mixed," you must change it.
    d. Some FLSA Status values end in FST (Failed Salary Test), which means the duties test for exempt status has been met, but the salary test has not been met. Employees in positions with this code should be paid overtime at the 1.5 rate.
    e. All of the above.

5. For Student Workers, what should you enter in the Unclassified Authorization field? (Hint: refer to the *Unclassified Authorization Codes – Reference.*)

    a. TUNC
    b. PXXX
    c. TXXX
    d. OXXX

6. What is true about the Agency Use field on the Barg Unit/Cost Projection page?

    a. Agencies can use this free-form seven-character field as they wish.
    b. Agencies may assign codes to position records, to group them for reporting purposes.
    c. You can enter any combination of letters, numbers or symbols, or leave it blank.
    d. Contact your agency Human Resources office to find out what to enter.
    e. All of the above.

7. To save the new position record and validate the position funding information, which three buttons do you select?

    ____

    ____

    ____

Check your answers on the next page.

Review Answers

Check your answers to the review questions.

1. To create a new position, what link do you select from the main menu?

    c. Position

2. Before entering data, make sure you have:

    d. All of the above

3. The Reports To data is used to produce the performance appraisal notification reports, and is used by the Enterprise Learning Management (ELM) system to send training enrollment approvals to the employee's supervisor.

4. What is true about the FLSA Status field, on the Barg Unit/Cost Projection page?

    e. All of the above.

5. For Student Workers, what should you enter in the Unclassified Authorization field? (Hint: refer to the *Unclassified Authorization Codes – Reference.*)

    b. PXXX

6. What is true about the Agency Use field on the Barg Unit/Cost Projection page?

    e. All of the above.

7. To save the new position record and validate the position funding information, which three buttons do you select?

    Save

    Validate

    Check Progress

Continue to the next topic, *Viewing Position Information*.

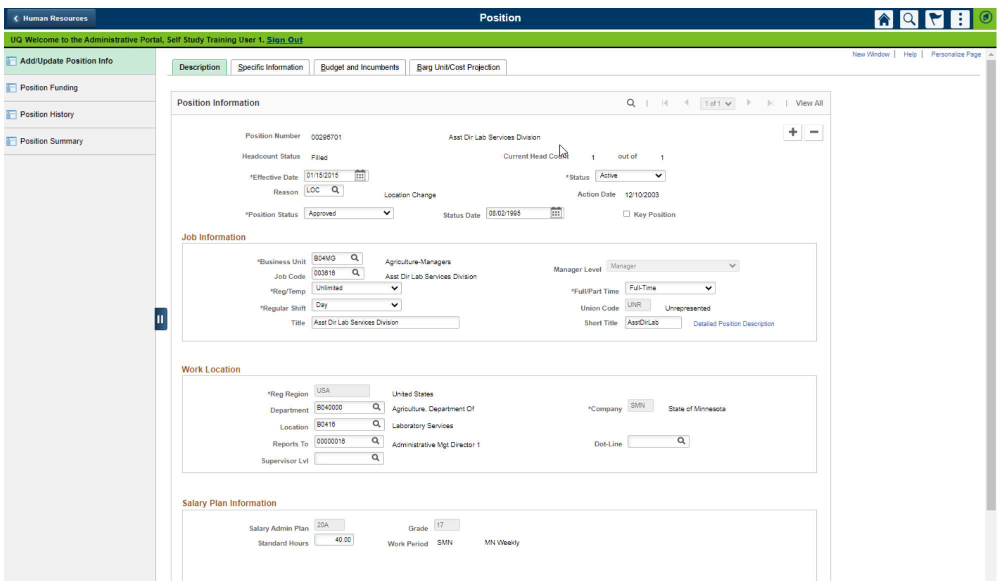
Introduction

Suppose you want to look up information about positions. By the end of this topic, you will be able to find and view the position information you need, by accessing these components: Add/Update Position Info, Position Summary, and Position History.

View Position Information – Walk-through

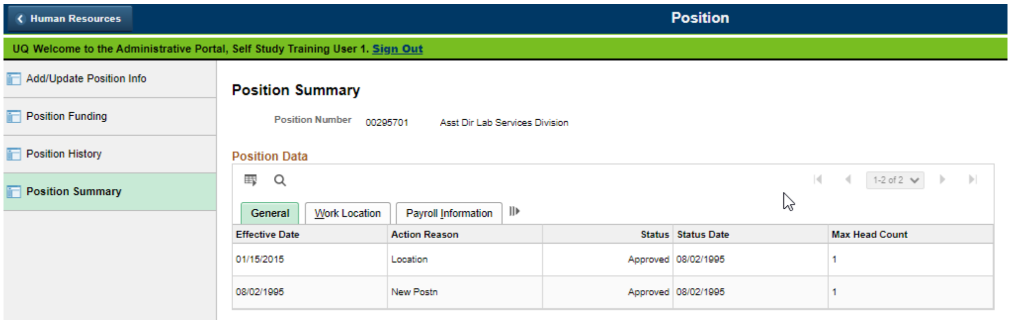
Assume that you’re doing workforce planning and you need information about some positions. Complete the following steps to view the position record.

View Position Data



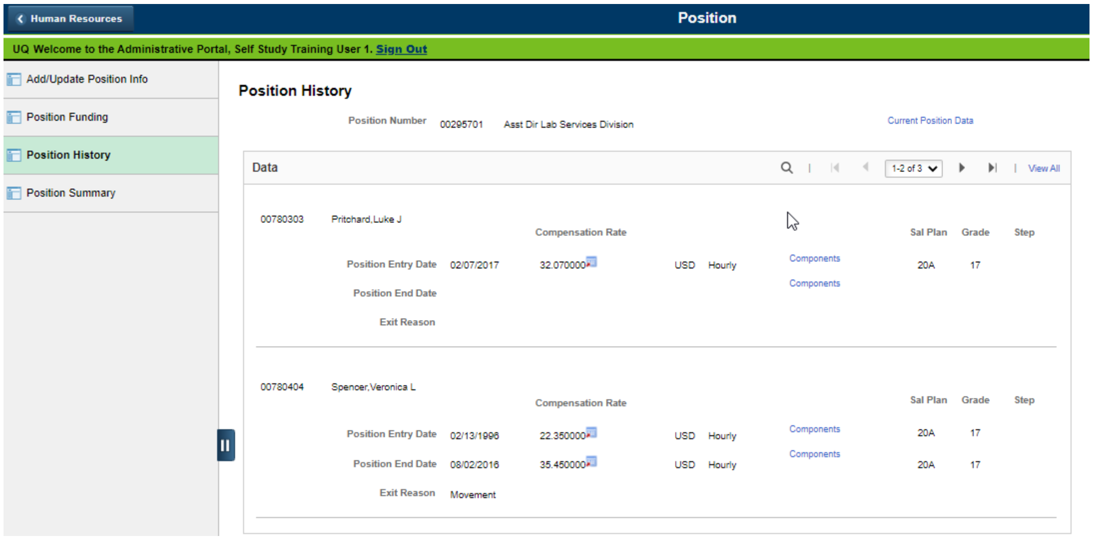
Action	Result
1. Select SEMA4 > Human Resources > Position > Add/Update Position Info.	Add/Update Position Info search page displays
2. Position Number • Enter 00295701 and press **Enter**.	**Description** page displays
3. Select each page tab. • Select each page tab and view the information.	Pages display

View Position Data Summary



Action	Result
1. Select SEMA > Human Resources Position > Position Summary and search for the same position number.	**Position Data Summary** page displays
2. View the summarized position information.	General information displays
3. Select the **Work Location** tab and view the information.	Location information displays
4. Select the **Payroll Information** tab and view the information.	Payroll information displays

View Position History



Action	Results
1. Select SEMA4 > Human Resources > Position > Position History for the same position.	**Position History** displays
2. View the information. • This page lists incumbents currently and formerly assigned to positions, and historical changes to compensation data associated with the entry and exit dates of the incumbents.	
3. Select the **Current Position Data** link and view the information.	Information about the position displays
4. Select **Return**.	**Position History** displays
5. Select the **Components** links, to view salary information for the incumbent's begin and end date.	Salary component information about the position displays
6. Select **Cancel**.	**Position History** displays
7. Select **Home**.	Main Menu displays

View Position Information – Exericse

Suppose you need to look up information about a position, for the purpose of workforce planning.

Resources

You may use these resources in completing this exercise:

- The step-by-step instructions in the walk-through
- SEMA4 Help

Directions

Complete the following steps to view position information.

Action	Result
1. Select SEMA4 > Human Resources > Position > Add/Update Position Info.	Add/Update Position Info search page displays
2. Position Number • Enter 00000016 and select **Search**.	Position Data component displays
3. View the information.	
4. From the Position Management menu, select Review Position/Budget Info > Position Summary.	Position Summary page displays, for the same position number
5. Select the **Work Location** tab and view the information.	Displays work location information
6. Select the **Payroll Information** tab and view the information.	Displays payroll information
7. Select **Home**.	Main Menu displays

Review Questions

To review what you have learned, answer the following questions. If you have difficulty answering the questions, review the topic.

1. Where can you find *summarized* information about a position?

    a. Position Enterprise component
    b. Position Data Summary component
    c. Position Funding component
    d. Position Administration component

2. Where can you find a list of employees currently and formerly assigned to a position?

    a. Position History component
    b. Position Data Summary component
    c. Position Funding component
    d. Description page

Check your answers on the next page.

Review Answers

Check your answers to the review questions.

1. Where can you find *summarized* information about a position?

    b. Position Data Summary component

2. Where can you find a list of employees currently and formerly assigned to a position?

    a. Position History component

Continue to the next topic, *Putting a Position on Hold.*

Introduction

If a position will not be filled immediately, you may put it on hold. For example, you might put a position on hold if an employee retired and the employee's position will not be filled right away.

Putting a position on hold is a task you may complete as part of several employee maintenance activities, such as retirement, separation or layoff. This helps you to identify which positions will be filled and which ones won't be filled.

Why Put a Position on Hold

Positions are put on hold to show that they will not be filled for an unspecified period of time. Put a position on hold to prevent inquiries (perhaps related to a claim) as to whether the position is going to be filled.

Some examples of situations in which you could put a position on hold are: Layoff, Retirement, Separation, Salary savings. They all have one thing in common; the position is *vacant*.

When the position remains filled, you do *not* put the position on hold. For example, do *not* put a position on hold for seasonal layoff, or paid or unpaid leave of absence. In these cases, the position remains filled because the employee is expected to return.

As a rule, put a position on hold only if it's *vacant* and you do not intend to fill it immediately.

On Hold vs. Inactive

What is the difference between putting a position on hold vs. inactivating a position?

- A position is *on hold* is not going to be filled for a while.
- An *inactive* position is no longer needed and is on its way to being archived.

View SEMA4 Help

Complete the following steps to find help for putting a position on hold.

Action	Result
1. Access SEMA4 Help.	SEMA4 Help Contents displays
2. Select the **Index** tab. Type *on hold*.	*on hold position* is highlighted
3. Select **on hold position**.	Position Change - On Hold - Check List displays
4. Read the check list.	
5. Notice the fields that need to be entered, to put the position on hold.	

Put a Position on Hold – Walk-through

Last week, an employee accepted a position elsewhere and resigned. The separation has been processed, so the position is vacant. Because of a cutback in funds, management has determined that the position is not going to be filled for a while, and the position should be put on hold.

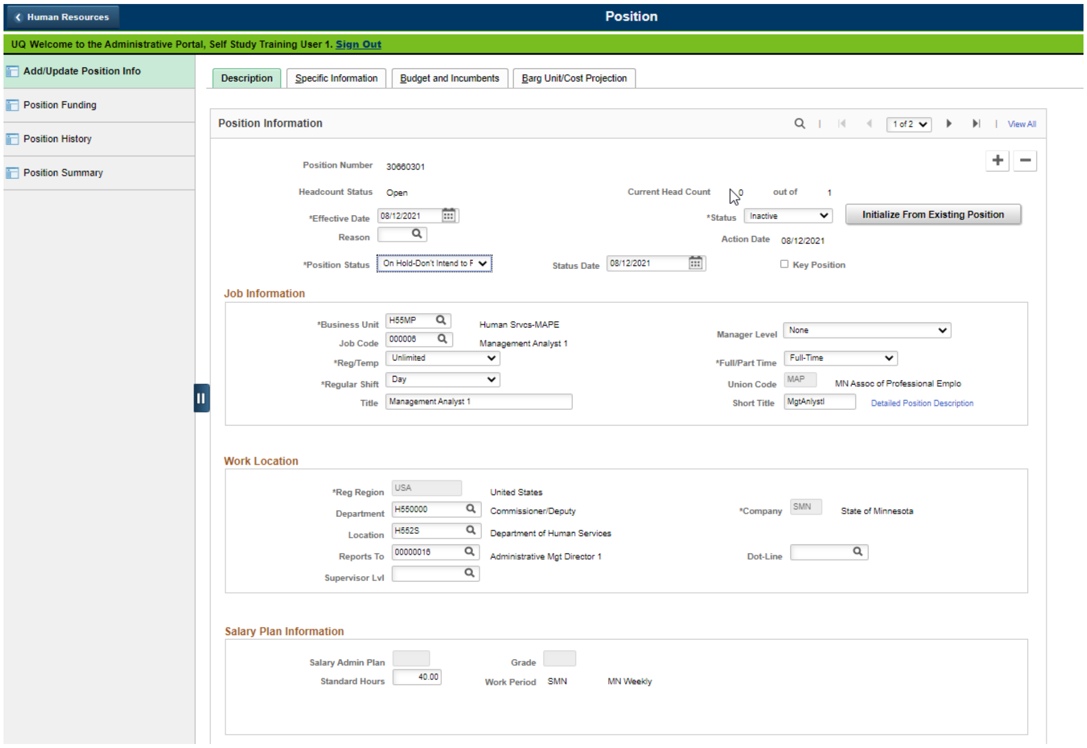
The main tasks are:

- Access the position record
- Insert an effective-dated row and select a **Reason**
- Update the Position Status

Access the position record

Action	Result
1. Select SEMA4 > Human Resources > Position > Add/Update Position Info.	A search page displays
2. Position Number • Enter 306603__ __ (substitute your two-digit code for the blanks).	**Description** page displays
3. Select the plus sign button, to insert an effective-dated row of information.	A new position row displays

Put the position on hold

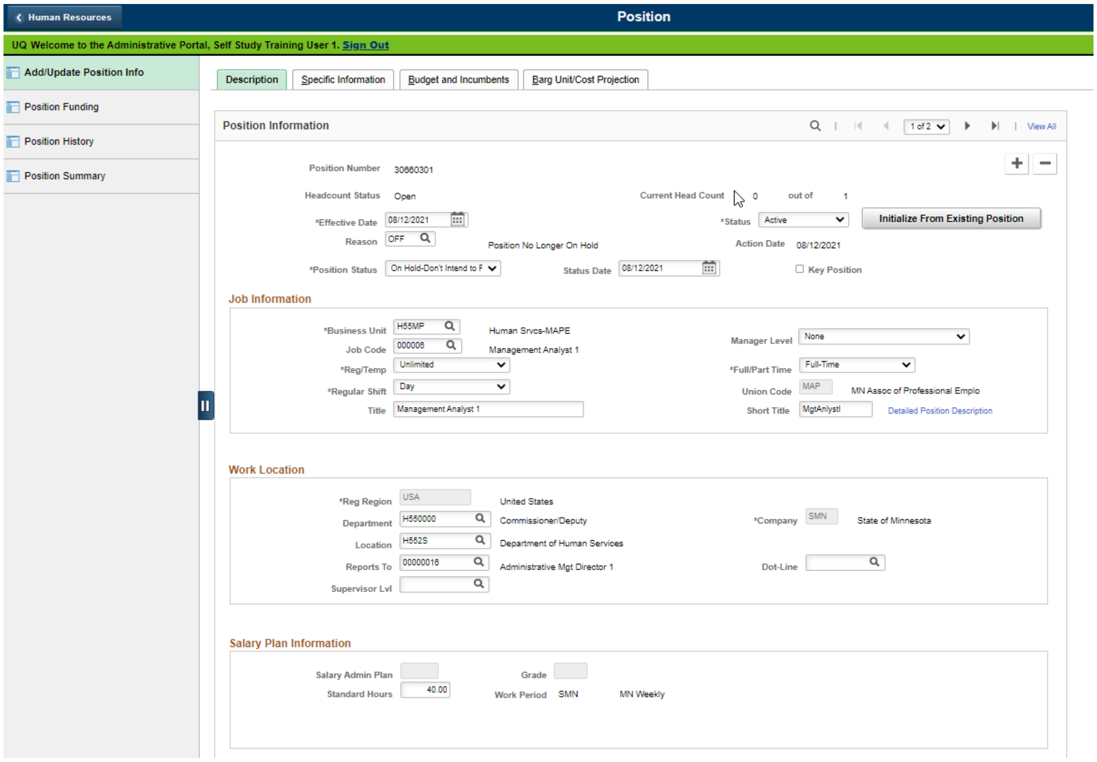


Field Name & Description	Data
1. In the new row, enter the **Effective Date** the position will officially be on hold. • This is the *first* day the position is on hold. By adding an effective-dated row, you maintain a historical record of the previous information.	03/16/____ this year
2. Reason • Enter or select a reason.	HLD - On Hold
3. Position Status • Select a position status.	On Hold-Don’t Intend to Fill

Action	Result
• Select **Save**. Keep this record displayed for the next part of the walk-through.	Record saves Status remains Active

Position no longer on hold

Assume that time has passed, and now the position is needed again. Complete the following steps to take the position off hold.



Action	Result
1. Use the record already displayed.	
2. Select the plus sign button, to insert an effective-dated row of information.	A new row displays

Field Name & Description	Data
1. Effective Date • This is the first day the position is no longer on hold.	04/01/____ this year
2. Reason • Enter or select a reason.	OFF – Position No Longer On Hold
3. Position Status • Select status Approved.	Approved

Action	Result
1. Select **Save**.	Record saves
2. Select **Home**.	Main Menu displays

Put a Position on Hold – Exercise

In this exercise, you have an opportunity to practice putting a position on hold.

Resources

You may use these resources in completing this exercise:

- The step-by-step instructions and screen prints in the walk-through
- SEMA4 Help

Directions

An employee retired last week. The agency does not intend to fill the position. Put the position on hold.

Field Name	Data
Position Number	355503_ _ (substitute your two-digit code for the blanks)
Effective Date of new row	05/06/____ this year
Reason	HLD - On Hold
Position Status	On Hold – Don't intend to fill

Action	Result
1. Select **Save**.	Record saves Status remains Active
2. Select **Home**.	Main Menu displays

Review Questions

To review what you have learned, answer the following questions. If you have difficulty answering the questions, review the topic.

1. An employee takes a leave of absence. Should you put the position on hold?
    a. Yes
    b. No

2. A position must be _______________ to put it on hold.
    a. Filled
    b. Authorized
    c. Vacant
    d. All of these

3. To put a position on hold you use which page(s)?
    a. Job Info
    b. Barg Unit/Cost Projection
    c. Description
    d. Both a & c

4. To take a position *off* hold, which reason code do you select?
    a. HLD
    b. WOC
    c. DID
    d. OFF

Check your answers on the next page.

Review Answers

Check your answers to the review questions.

1. An employee takes a leave of absence. Should you put the position on hold?

    b. No

2. A position must be ______________ to put it on hold.

    c. Vacant

3. To put a position on hold you use which page(s)?

    c. Description

4. To take a position *off* hold, which reason code do you select?

    d. OFF

Continue to the next topic, *Selecting Reason Codes for Changes to Position Records*.

Selecting Reason Codes for Changes to Position Records

Introduction

Why are changes made to a position record? Here are some examples:

- Position responsibility significantly changes, and a new classification more accurately describes the position because of an audit.
- Employment condition changes (i.e. from full-time to part-time).
- Funding changes for a position.
- A position is no longer needed and will be inactivated.

By the end of this topic, you will be able to change position information, funding information, and inactivate a position.

Effective Dates

First, let's review an important concept: effective dates.

Effective dates associate information with specific dates. Effective dates allow you to enter new information, while preserving the information that's already there. SEMA4 uses effective dates to maintain history, such as changes in the job code for a position.

Effective-dated information is often displayed in groups of fields, called *rows*, within a page. Insert a new row of information each time a change is made. The new row will use today's date as a default value for Effective Date. You can change the data in the Effective Date field by typing the desired date over the default date.

For example, suppose you want to record a change of job classification for a position, to take effect next Monday. You can enter the transaction today with an effective date of next Monday. Although you entered the transaction today, it will not actually take effect until next Monday.

Future, Current, Historical

- *Future* effective-dated information takes effect on dates that are beyond today's date. For example, if today's date is 1/2/2018, an authorized user can enter a change to a position's funding information with a future date of 3/1/2018. The user does not have to remember to make the entry on 3/1/2018.

- *Current* effective-dated information is the information that has the most recent effective date. This information is accurate today.

- *Historical* information has effective dates that are earlier than the effective date of the current information.

Example

For example, suppose today's date is 11/2/2018. Looking at a position record, you see these rows of information:

- A new position created on 2/15/2012
- A change of job classification on 3/10/2014
- A change of department on 6/1/2016
- A work hour change on 01/24/2019

Today's date is 11/2/2018. The *current* row, 6/1/2016, contains the most recent information. The *historical* rows, 2/15/2012 and 3/10/2014, are prior to the current row. The *future* row, 01/24/2019, is beyond today's date.

Page Actions

Now let's see how page actions, such as **Update/Display**, **Include History** and **Correct History** work with effective dates to access information.

Update/Display

- View current and future information (pages default to this mode).
- Change future information only.
- Insert a new group of fields with an effective date that is the same as, or more recent than, the current effective-dated information, by selecting the plus sign button.

Include History

- This is the same as Update/Display, with the added ability to view historical information.

Correct History

- View all information, whether current, future or historical.
- Change all information, whether current, future or historical.
- Insert a new group of fields with any effective date, by selecting the plus sign button.

Use caution when correcting records

The security profile assigned to you controls which page actions you can use. Not all users have Correct History. If your job requires you to use Correct History with position data, personal data or job data, and then you must complete the *Correcting HR Data* learning guide.

Using the Correct History page action can be dangerous because you can remove and change history. Use caution when using Correct History. Be sure you have accessed the appropriate record before making any changes, and make only the necessary changes. Correct History should be used only to fix errors on current and historical records.

Do *not* select Correct History routinely. Generally, use **Update/Display** for most tasks. Use Include History if you need to look at history.

Work with Effective Dates – Exercise

Using the information in this topic, answer the following questions.

A position record contains four rows of information with these effective dates:

01/15/2011	Historical
02/15/2012	Historical
06/01/2017	Current [Note: 11/02/2018 is today's date]
01/03/2020	Future

1. Generally, use the following page action:

    a. Update/Display (default)
    b. Include History
    c. Correct History

2. If you want to *view* the information dated 01/15/2011, which action should you use?

    a. Update/Display (default)
    b. Include History
    c. a or b

3. Which action(s) should you use to fix an error on the information dated 06/01/2017?

    a. Update/Display (default)
    b. Include History
    c. Correct History
    d. b or c

Check your answers on the next page.

Solution

Check your answers to the exercise questions.

1. Generally, use the following page action:

    a. Update/Display (default)

2. If you want to *view* the information dated 01/15/2011, which action should you use?

    b. Include History

3. Which action(s) should you use to fix an error on the information dated 06/01/2017?

    c. Correct History

Maintaining Incumbent Job Information

Now let's see how SEMA4 uses effective dates and position information to maintain incumbent **job** information.

View SEMA4 Help

When you're making a change to information in a position record, the action is Position Change. In the **Reason** field, on the Description page, you enter the reason for the change.

How do you know which reason code to use? SEMA4 Help can assist you in selecting the appropriate reason code.

The **Position Change – Check Lists** topic in SEMA4 Help contains a list of all reason codes, as well as lightning-quick hints that help you make the appropriate selection. When you select a reason code from the list, a check list displays.

The check list is like a road map to your transaction. It contains links to other topics such as policies and procedures, and step-by-step instructions. Even after you're familiar with how to update position records, always refer to the check list in SEMA4 Help, to be sure to cover all tasks. SEMA4 Help is updated frequently, so don't rely on old printouts.

In the check lists, notice information regarding how the transaction may affect the employee's insurance eligibility.

Action	Result
1. Access SEMA4 Help.	SEMA4 Help Contents displays
2. Select **HR/Payroll Functions**, and then select **Position Management**.	Position Management – Contents displays
3. Select **Reference**.	Position Management – Reference displays
4. Select **Position Management's Relationship to Employee Job Data**.	Position Management's Relationship to Employee Job Data – Reference displays
5. Select Back twice on your browser's toolbar.	Position Management – Contents page displays
6. Select **Check Lists**.	Position Change – Reason Codes displays

Action	Result
7. To get a lightning-quick hint, select the lightning bolt button next to the description you wish to view. • For this example, select the **lightning bolt button** next to Department ID Change (DID). Read the hint, and select again to exit the pop-up. • If you're not sure which reason code to use, select the lightning bolts, to get tips. You can contact your SEMA4 HR Specialist for further help. Avoid selecting reason Other.	Pop-up displays a hint about Dept ID change
8. Select **Department ID Change (DID)**.	Position Change - Department ID Change - Check List displays
9. On the check list, notice the reason code, DID. Notice the fields that need to be changed on the position record, in order to process a department ID change.	
10. Notice the links to step-by-step instructions: Update position information, and Update position fields in job data.	
11. On the check list, scroll down and notice the fields that need to be updated in the incumbent's job record, on the Work Location page.	
12. Select the Back button on your browser.	Position Change – Reason Codes displays
13. Scroll down, select the **lightning bolt button** next to Work Hour Change (EMP), and read the hint.	Pop-up displays a hint about Work Hour Change
14. Select **Work Hour Change (EMP)**.	Position Change - Work Hour Change - Check List displays
15. In the check list, notice how the transaction may affect the employee's insurance eligibility.	
16. On the check list, notice the reason code, EMP. Scroll down and notice the fields that need to be changed in order to process a work hour change.	
17. Exit SEMA4 Help.	

Processing Changes to Filled Positions

When you *update* data on the position record, the incumbent's job data is **not** automatically updated by the system. It's up to *you* to update the position record, and then update the *incumbent's* job data.

After saving changes to a position record, you may get the following message, warning you to update the incumbent job data: "Incumbent data has not been updated. Job Data Records for incumbents must be update manually to reflect the position changes. If the fields you changed on the position record are also enterable fields on the Job Data record, you must update the fields on the Job Data pages. Click the Budget and incumbents tab for a list of current incumbents."

You must access each incumbent's Job Data and update the information.

Be sure to update the position record first, and then update the incumbent's job data.

If there are no incumbents, you don't need to update the incumbent's job record.

Changing Position Data and Incumbent's Job Data

Changes to a filled position fall into two categories, described below.

A. Changes to position information that do not affect job data.

Some changes to position information do not affect job data. For example, changes to the Maximum Head Count field. You don't need to update the incumbent's job record, because there is no effect on job data.

B. Changing position information that affects job data.

Some changes to position information affect job data. For example, changes to the following fields:

- Bargaining Unit (Barg Unit/Cost Projection page)
- Business Unit (Description page)
- Classified Indc (Specific Information page)
- Department (Description page)
- Full/Part Time (Description page)
- Grade (Description page)
- Job Code (Description page)
- Location Code (Description page)
- Option Code (Barg Unit/Cost Projection page)
- Reg/Temp (Description page)
- Regular Shift (Description page)
- Reports To (Description page)
- Salary Admin Plan (Description page)
- Salary Authority (Barg Unit/Cost Projection page)
- Standard Hours (Description page)
- Union Code (Description page)

When you change these position field values, you also need to update the incumbent's job record. To do this:

1. Review the incumbent's compensation.
2. Add a new row.
3. Enter the effective date, action Position Change, and reason.
4. Delete the position number and press **Tab**.
5. Re-enter the position number and press **Tab** again.
6. Change or re-enter certain compensation-related fields.
7. Select **Calculate Compensation**, if necessary.
8. Save.

There is rarely a need to select the **Override Position Data** button. This causes the position and job records to be out of sync. If you must use the Override Position Data button, remember to deselect it when you have completed the transaction! Do not use this button to get past an error message. Contact SEMA4 HR Services to verify that your situation warrants using this button.

Position Data Can Affect Insurance Eligibility

Pay special attention to these Position Data fields: Salary Authority, Union Code, Reg/Temp, and Full/Part Time. These fields affect employee insurance eligibility.

To remember the Position Data fields that can affect insurance eligibility, think **SURF**:

Salary Authority

Union Code

Reg/Temp

Full/Part Time

Be sure these field values are accurate!

Change a Position's Department ID – Walk-through

In this walk-through, you will change position information in SEMA4. You will be working with the same pages that you saw in the topic *Establishing a New Position.*

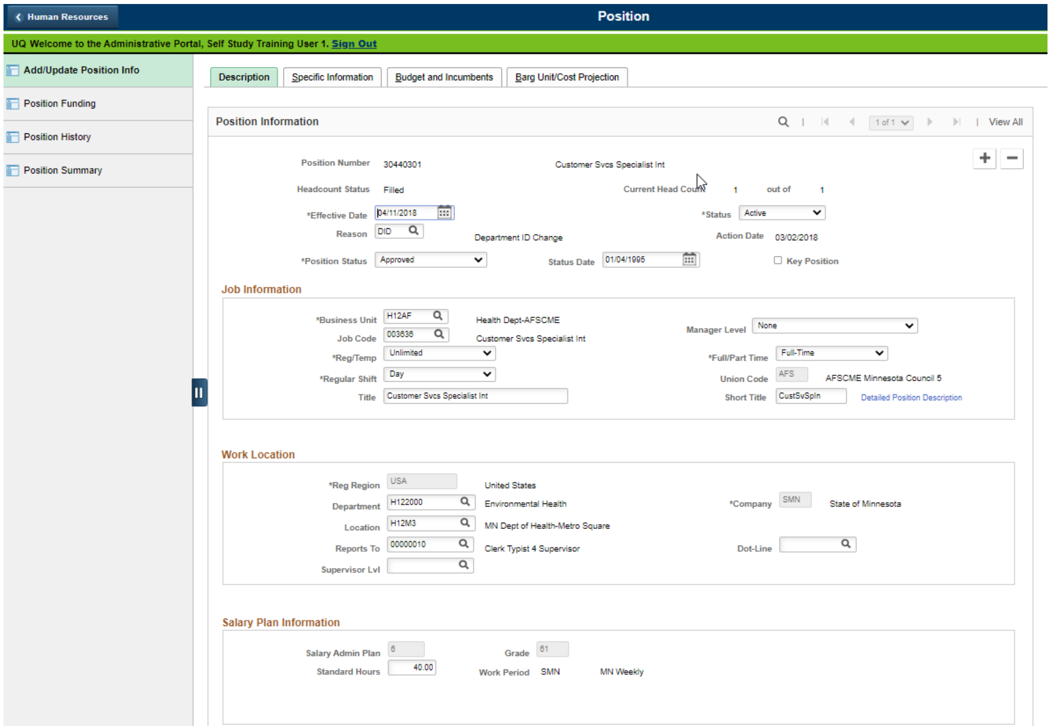
The department ID of the position is changing because of reorganization. A department ID is an organizational entity, such as a department, division or work group.

Assume that your security profile has access to *both* the old and new department ID. You will enter changes to the position data, and then the incumbent's job data.

Access the position record

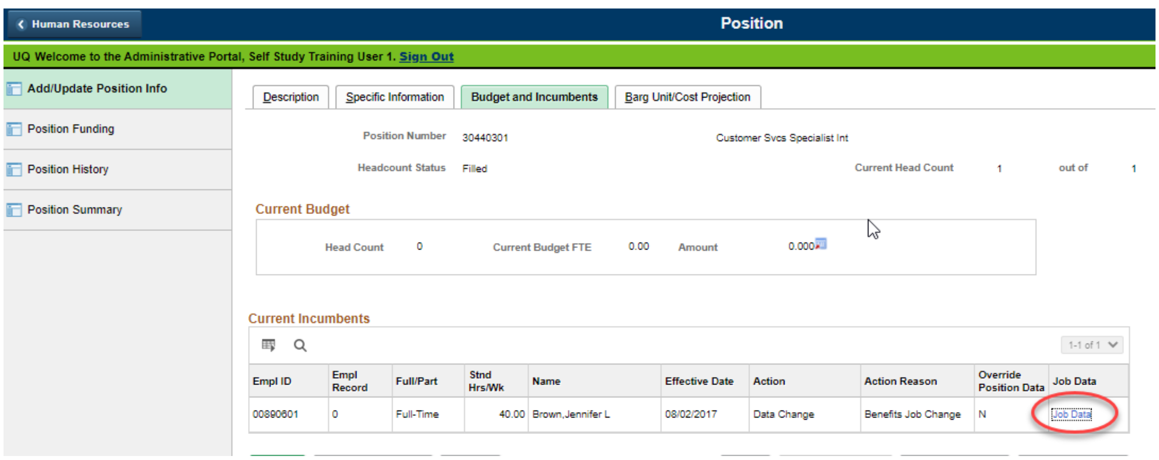
Action	Result
1. Select SEMA4 > Human Resources > Position > Add/Update Position Info.	Add/Update Position Info search page displays
2. Position Number • Enter 304403__ __ (substitute your two-digit code for the blanks) and select **Search**.	**Description** page for the position displays
3. Select the plus sign button, to insert a row of information.	New row displays

Enter changes to position record



Field Name & Description	Data
1. Effective Date • Enter the date that this change is effective.	04/11/____ this year
2. Reason • Enter or select the reason code. • Avoid selecting the reason Other – Position Change. For advice on selecting a reason code, refer to the Check Lists, lightning bolt hints, or call a SEMA4 HR Specialist.	DID, Department ID Change
3. Department • Enter or select the new Department ID and press **Tab**.	H122000
4. Notice that the **Location Code** fills in.	Accept default

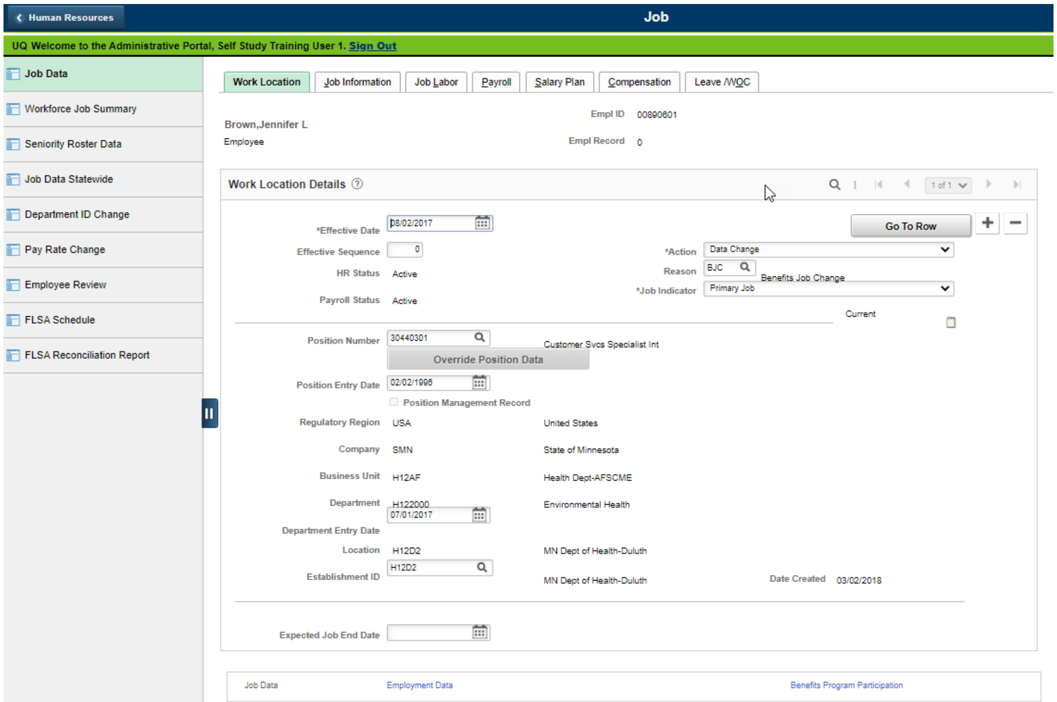
Action	Result
1. Select the **Barg Unit/Cost Projection** page.	**Barg Unit/Cost Projection** page displays
2. Change the **Seniority Unit** if necessary.	No change
3. Select **Save** to save the position record. • If you receive a warning message reminding you to update incumbent job data, select **OK** and continue to the next step. • If there's no warning message, you're done.	The record saves and a warning message displays
4. Select the **Budget and Incumbents** page.	**Budget and Incumbents** page displays



Action	Result
5. Note the incumbent(s) whose job record is assigned to this position.	
6. For this example there is one incumbent. Select the incumbent's **Job Data** link. • Alternatively, you can use the menu to navigate to the incumbent's job record.	The incumbent's **Work Location** page displays

Enter changes to Job Data

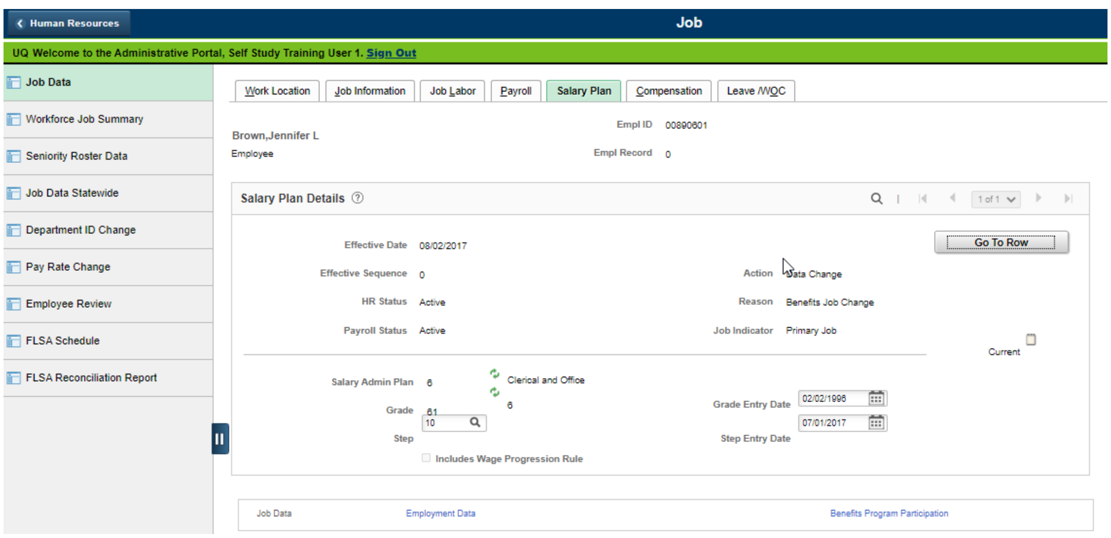
To keep the incumbent's record in sync with the changes you made to the position record, you must update the Job Data record.



Field Name & Description	Data
1. On the Work Location page, select the plus sign button, to add a new effective-dated row of information.	A duplicated row displays, with today's date in the effective date
2. Effective Date • Enter the same effective date used in the position change.	04/11/____ this year which is the same as the effective date entered on the position record
3. Action • Select action Position Change.	Position Change
4. Reason • Enter the same reason used on the position record.	DID, Department ID Change

Field Name & Description	Data
5. Position Number • Highlight the position number and press the **Delete** key. • Press the **Tab** key. Be sure to press **Tab**, after deleting the position number! • Re-enter the position number, and press **Tab** again.	304403__ __ (substituting your two-digit code) The updated position information fills into the incumbent's job record
6. Establishment ID • When needed, select the look up button. In the search box, select **Look Up** and select the establishment ID.	For this example, accept the displayed value

If the employee is on step, select the **Salary Plan** page.



Action	Result
1. If the employee is on step, and the **Step** is blank, do the following: • Select the right arrow button to look at the previous row, and write down the **Step**. • Select the left arrow button to return to the row you're processing. • Re-enter the step, which you wrote down. Press **Tab**.	Previous row displays. Step: 10

Action	Result
2. Select the **Compensation** page.	Compensation page displays
3. Compensation is not changing, but you have to select the **Calculate Compensation** button.	
4. Select **OK**. • If a warning message displays, select **OK**.	*Saved* displays briefly in the upper corner
5. If the position has more incumbents, update the rest of the incumbent records.	There are no more incumbents

Reports To field on Job Data is used by ELM

The Enterprise Learning Management (ELM) system uses data from the **Reports To** field on Job Data. The **Reports To** position number needs to be accurate so that the ELM system can send the employee's training enrollment approvals to the appropriate supervisor.

Whenever you update the Reports To field in Position, remember that there has to be a row on Job which matches the updated Position row. The effective date on the rows must be the same.

For transactions where the *main* change is the Reports To value, you enter action/reason Position Change/RTP (Reports to Position Change) on both the Position and Job records.

For other transactions you enter on both Position and Job, such as Position Change/DID (Department ID Change), if you change the Reports To value on Position, it will appear on Job when you enter the Position Change row there.

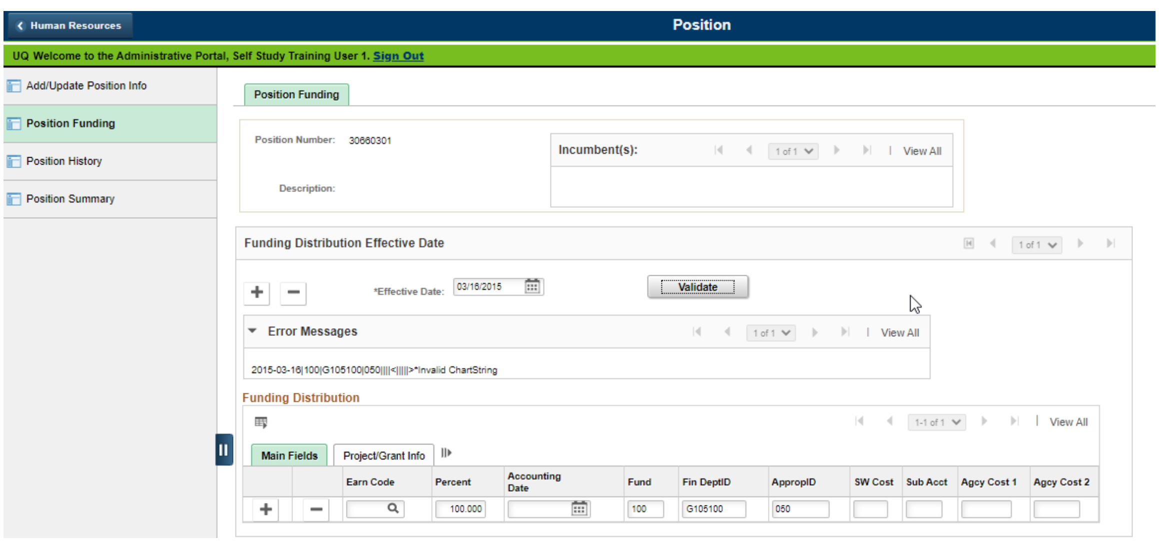
Change Funding Information – Walk-through

Another type of change to a position record is a change in funding. You might change a position's funding information when the funding source changes. For example, a grant may change.

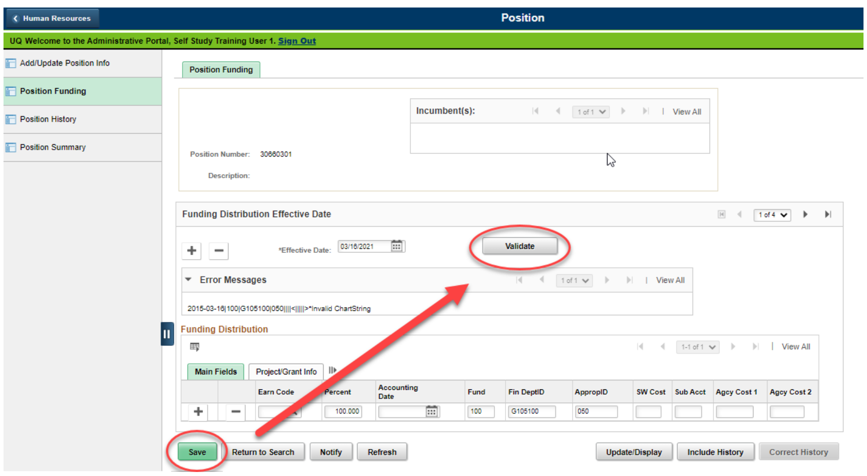
Let's assume that the funding source is changing for a position and you need to enter the change.

Access and update the position funding

Action	Result
1. Select SEMA4 > Human Resources > Position > Position Funding.	Position Funding search page displays
2. Position Number • Enter 306603__ __ (substitute your two-digit code for the blanks) and press **Enter**.	**Position Funding** page displays
3. Select the plus sign button next to the Effective Date, to insert a new row.	New row displays



Field Name	Data
1. Effective Date • Enter the date the new funding becomes effective.	04/18/____ this year
2. Fin DeptID • Enter the change.	G105100
3. AppropID • Enter the change.	050



Action	Result
1. Select **Save**.	Record saves
2. Select the **Validate** button.	Validation starts
3. Select the **Check Progress** button every few seconds until complete. In the User Training database, select it a few times for practice, and ignore any error messages that may display. (*In the real system, if error messages display, fix the information according to the error messages. Repeat the save/validate/check progress until you receive no errors.*)	If there are any validation errors, they display
4. Select **Home**.	Main Menu displays

Inactivate a Position

You inactivate a position when it is vacant and will remain vacant indefinitely. Deleting the Intend to Fill Date removes the vacant position from cost projection calculation.

If you plan to use a position in the future, do not inactivate it – instead, put the position on hold.

If the employee is laid off from this position, delete the position number on the Work Location page (Job Data component). This breaks the link between the position and the incumbent.

View SEMA4 Help

Complete the following steps to find help for inactivating a position.

Action	Result
1. Access SEMA4 Help.	SEMA4 Help Contents page displays
2. Select **Check Lists**, and then select **Position Change**.	Position Change – Reason Codes check lists display
3. Select the **lightning bolt button** next to Abolishment of Position (ABL). • Read the hint.	Pop-up displays information about abolishment of position
4. Select **Abolishment of Position (ABL)**.	Position Change - Abolishment of Position - Check List displays
5. In the check list, select **Inactivate the Position**. • View the steps.	Step-by-step instructions display

Inactivate a Position – Walk-through

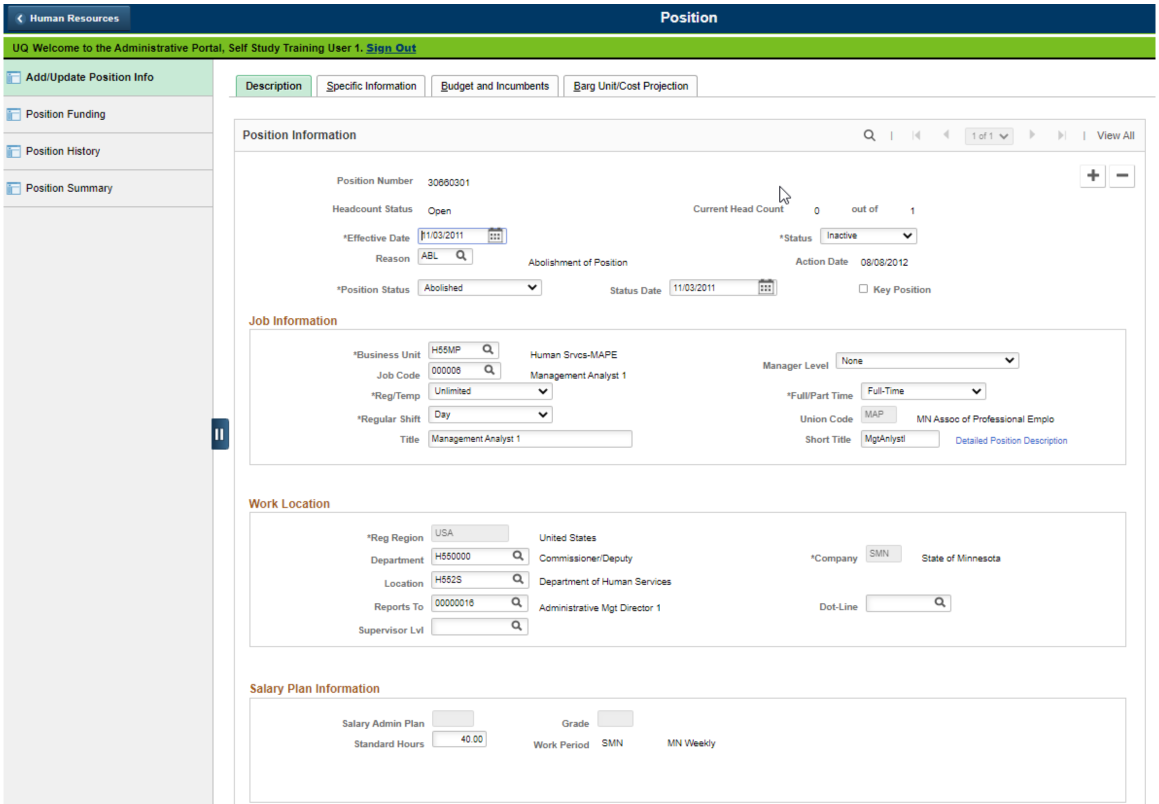
In this walk-through, you will inactivate a position in SEMA4.

Let's say that a project has been completed. The employee has gone on to another job. The position is to be inactivated because it will not be used again.

Access the position record

Action	Result
1. Select SEMA4 > Human Resources > Position > Add/Update Position Info.	**Add/Update Position Info** page displays
2. Position Number • Enter 306603__ __ (substitute your two-digit code for the blanks) and press **Enter**.	**Description** page displays
3. Select the plus sign button, to add a new row.	A new row displays

Inactivate the position



Field Definition	Data
1. Effective Date • Enter the date the position becomes inactive.	05/01/____ this year
2. Reason • Enter or select the reason code.	ABL – Abolishment of Position
3. Position Status • Select a value.	Abolished

Select the **Barg Unit/Cost Projection** page.

Action	Result
1. Delete the date, if any, in the Intend to Fill Date field. • Deleting the Intend to Fill Date removes the vacant position from cost projection calculation.	Intend to Fill date is blank
2. Select **Save**. • Notice that the **Status** has changed automatically, from Active to Inactive.	The record saves
3. Select the **Description** page. • Notice that the **Status** has changed to Inactive.	The Status is Inactive
4. Select **Home**.	Main Menu displays

Select a Position Action Reason – Exercise

In this exercise, you will use the lightning-quick hints in SEMA4 Help to select position reason codes for various changes to position records.

Resources

You may use the walk-throughs and SEMA4 Help in completing this exercise:

Directions

In SEMA4 Help, view lightning-quick hints, to decide which reason code is appropriate for each situation below. Write the letter (a-f) in the Reason Code column.

Possible Reason Codes:

a. Extend Position End Date
b. Change in Allocation
c. Cost Projections
d. Reallocation – Demotion
e. Position No Longer On Hold
f. Location Change

Situation	Reason Code (a-f)
1. The responsibilities of a position have evolved significantly over time; the position should now be assigned to a lower job class (demotion), and the position is both classified and occupied.	
2. You need to change (extend) the position end date.	
3. A position is moving to a different physical location.	
4. A position is no longer on hold.	
5. A new job code is assigned to a position due to an abrupt change.	
6. The only thing changing about the position is a field in the Cost Projection Use box.	

Check your answers on the next page.

Solution

Compare your answers to the solution below.

1. d
2. a
3. f
4. e
5. b
6. c

Review Questions

To review what you have learned, answer the following questions. If you have difficulty answering the questions, review the topic.

1. True or False: When you enter a change to a position record, you should always select Correct History.

    a. True
    b. False

2. Which fields on the position record affect insurance eligibility? (Hint: Think 'SURF')

    a. Salary Authority, Union Code, Reg/Temp, Full/Part Time
    b. Step, Unclassified Indc, Rate, FTE
    c. Seasonal, Units, Regular Shift, Fiscal Year
    d. Salary Plan, Unclassified Authorization, Reference, Facility

3. To make changes to a position record, you ______.

    a. Add a new position
    b. Type over the existing data on the current row
    c. Add a new row to a position record and enter the changes

4. When changes are made to the Position Data for a filled position, what is the next step?

    a. Make changes to next position
    b. Make same changes to the incumbent's Job Data pages
    c. No other steps
    d. None of the above

5. On the incumbent's job record, how do you get the updated position data to fill in?

    a. Delete position number and re-enter it.
    b. Delete position number, **Tab**, re-enter it, **Tab**.
    c. Delete position number and select Lookup.
    d. Position data fills in automatically.

6. To access Position Funding, select Organizational Development > Position Management > Maintain Positions/Budgets > __________________ __________________.

    a. Position Data
    b. Position Management
    c. Position Workforce
    d. Position Funding

7. In validating position funding, an error displays. You _______________.

    a. delete the record and start over.
    b. add another row and enter the correct information.
    c. fix the information and save, validate, check progress again.

8. If you're unsure of the reason code to select, you should:

    a. In SEMA4 Help, select Check Lists, and then select the lightning bolts.
    b. Contact SEMA4 HR Specialist for advice.
    c. Select reason code Other.
    d. Select anything and fix it later.
    e. a or b.

Check your answers on the next page.

Review Answers

Check your answers to the review questions.

1. True or False: When you enter a change to a position record, you should always select Correct History.

    b. False

2. Which fields on the position record affect insurance eligibility? (Hint: Think 'SURF')

    a. Salary Authority, Union Code, Reg/Temp, Full/Part Time

3. To make changes to a position record, you ______.

    c. Add a new row to a position record and enter the changes

4. When changes are made to the Position Data for a filled position, what is the next step?

    b. Make same changes to the incumbent's Job Data pages

5. On the incumbent's job record, how do you get the updated position data to fill in?

    b. Delete position number, **Tab**, re-enter it, **Tab**.

6. To access Position Funding, select Organizational Development > Position Management > Maintain Positions/Budgets > ___________________ ___________________.

    d. Position Funding

7. In validating position funding, an error displays. You _________________.

    c. fix the information and save, validate, check progress again.

8. If you're unsure of the reason code to select, you should:

    e. a or b.

Continue to the next topic, *Correcting Position Information*.

Introduction

Sometimes you may discover that you entered the wrong information in a field – a typo. If this happens, use the Correct History page action to fix the information.

The security profile assigned to you controls which actions you can use. Not all users have authority to correct history. If your job requires you to use Correct History with position data, personal data or job data, and then you must complete the *Correcting HR Data* learning guide.

By the end of this topic, you will know when and how to make corrections to position information.

Correcting Position Data

What's the difference between changing position information and correcting it?

- When you make a *change* to position information, you insert an effective-dated row. The previous information is preserved.
- When you *correct* position information, you select Correct History and you do not insert an effective-dated row. You type over the existing data in one or more fields. The previous version of that data is gone.

Here's an example of a situation where you would use Correct History: Immediately after creating a position record and saving it, you find that the title entered is incorrect. Select **Correct History** to fix the error and save the record.

To avoid accidentally wiping out data, you should use Correct History only to fix errors.

Corrections do *not* roll down to employee records. The message "Warning - Incumbent data has not been updated" displays. Select **OK**, select the **Budgets and Incumbents** page to get a list of current incumbents, and update position-related fields in employee job data.

Caution

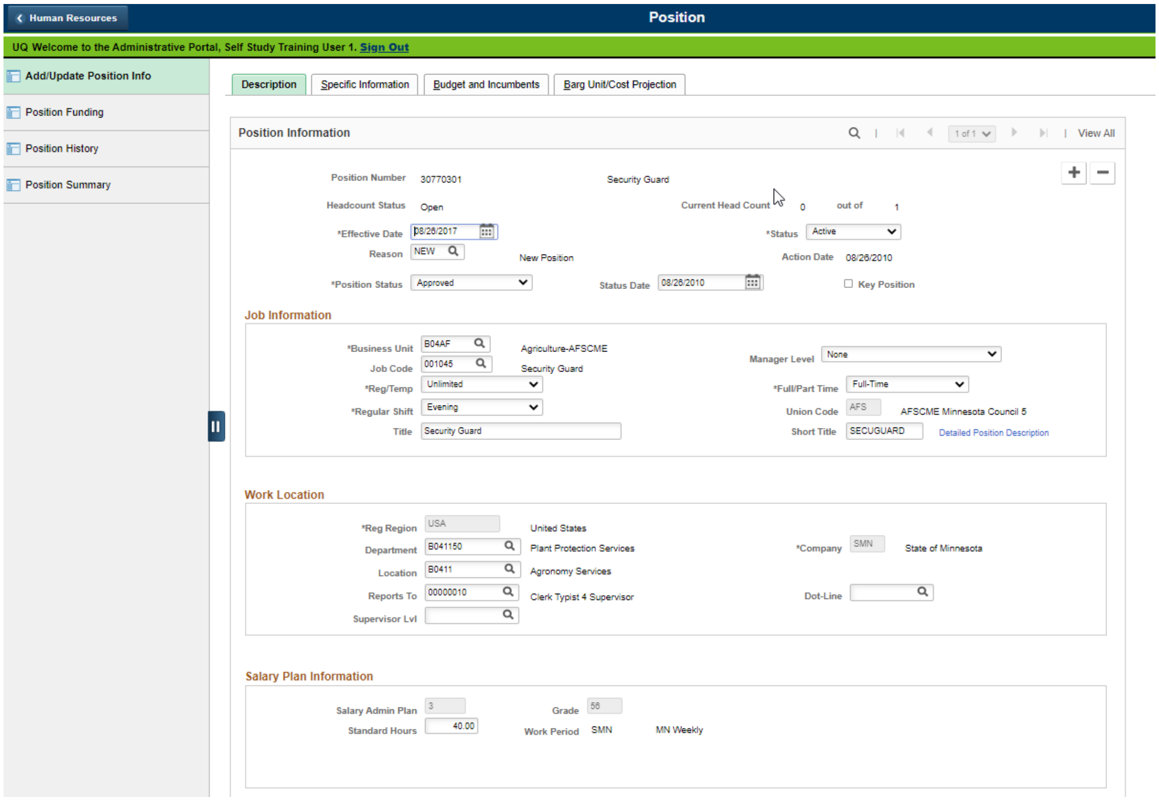
You should *not* fix the following fields using Correct History: **Department**, **Leave Authority**, **Salary Authority**. Historical values of these fields are needed for payroll processing. If these fields are wrong, find the incorrect row(s), add an effective-dated row and enter any necessary changes. Do not use Correct History to wipe out existing values in these fields.

Correct Position Information – Walk-through

Suppose that the regular shift on a vacant position record is erroneous. It should be evening shift instead of day shift. You don't want to insert another row with another effective date because the regular shift is not actually changing; you are fixing an error.

You will make this correction by accessing the Position Data component, typing the correct information and saving it.

Action	Result
1. Select SEMA > Human Resources > Position > Add/Update Position Information.	Add/Update Position Info search page displays
2. Position Number • Enter 307703__ __ (substitute your two-digit code for the blanks). • Select the **Correct History** check box and press **Enter**.	**Description** page displays
3. If you didn't select the Correct History check box on the search page, select **Correct History** in the toolbar.	
4. If necessary, navigate to the row you need to correct.	For this example, the row already displays



Action	Result
1. In the **Regular Shift** field, select the correct shift, Evening, or 2.	
2. Select **Save**.	Record saves
3. Notice that the **Headcount Status** is Open, which means the position is vacant. So you don't need to fix an incumbent's record.	
4. Select **Home**.	Main Menu displays

If the position you changed has incumbent(s) and the data you corrected affects the employee's job data, you must also update position fields in the incumbent's job data. In this example, there is no incumbent.

Review Questions

To review what you have learned, answer the following questions. If you have difficulty answering the questions, review the topic.

1. Use Correct History to ____________________________.

    a. Enter all effective-dated changes
    b. Fix errors
    c. View current information
    d. All of the above

2. To avoid accidentally wiping out data, which action should you routinely use to update records?

    a. Correct History
    b. Include History
    c. Update Display (default)

3. True or False: When you correct data on a filled position record, you don’t have to make the correction in the incumbent’s job data.

    a. True
    b. False

Check your answers on the next page.

Review Answers

Check your answers to the review questions.

1. Use Correct History to ___________________________.

    b. Fix errors

2. To avoid accidentally wiping out data, which action should you routinely use to update records?

    c. Update Display (default)

3. True or False: When you correct data on a filled position record, you don't have to make the correction in the incumbent's job data.

    b. False

Continue to the next topic, *Using Standard Reports on Position Management Information*.

Using Standard Reports on Position Management Information

Introduction

SEMA4's standard reports are available to view online. By viewing standard reports online, you will save paper, save space, and get information when you need it.

Knowing how to identify and use information provided by standard reports allows you to access to the most current information available when you need it.

Reports Review

In the *SEMA4 Overview* learning guide you were introduced to DocumentDirect, the system used for viewing and printing SEMA4 InfoPac reports.

View Report Description in SEMA4 Help – Walk-through

In this walk-through, you will look in SEMA4 Help to find out about standard reports used for position management.

Action	Result
1. Access SEMA4 Help.	SEMA4 Help displays
2. Select **HR/Payroll Functions**, and then **Position Management**, and **Reports**.	A list of position management report names display
3. Select the name of the report: **List of Options Showing Classes Where Used (HP8010)**.	Report description displays
4. Find the report frequency.	
5. Find the suggested use of this report.	

View Position Management Report Descriptions – Exercise

In this exercise, you will find information about some position management reports.

Resources

You may use SEMA4 Help in completing this exercise.

Directions

Find position management report descriptions and answer the questions.

Action	Result
1. Access SEMA4 Help.	SEMA4 Help displays
2. From the SEMA4 Help Contents, select **Reports Inventory**, and then **Report Descriptions**. Under Human Resources Reports, select **Listed by Business Function**. Select **Position Management**.	A list of position management reports displays
3. Select the report: **Vacant/Occupied Positions by Agency and HR Processing Unit (HP6194)**.	Report description displays
4. Read about the report, and notice the report frequency.	
5. From the **Reports Inventory**, select **Report Descriptions**. Under Human Resources Reports, select **Listed by Business Function**. Select **Position Management**, and then select the report **Positions with Invalid ChartStrings (HP6670)**.	Report description displays
6. Read about the report, and notice the possible uses.	
7. Select **Report Fields**.	A list of the report fields displays
8. Select some of the field links.	Field definitions display

Review Questions

To review what you have learned, answer the following questions. If you have difficulty answering the questions, review the topic.

1. What is the report frequency of the *Vacant/Occupied Positions by Agency and HR Processing Unit* report?

    a. Daily – in a.m.
    b. Monthly – beginning of each month
    c. Weekly – every Friday
    d. None of the above

2. What are some possible uses for the *Positions with Invalid ChartStrings* report?

    a. Identify invalid accounts as a result of fiscal year changes
    b. Synchronize accounts between the Position Funding page and the Accounting system
    c. Performance review
    d. Both a and b

3. What kind of additional help is available about reports?

    a. Report field definitions
    b. Sort order
    c. Font size
    d. Both a and b

Check your answers on the next page.

Review Answers

Compare your answers to the solution below.

1. What is the report frequency of the Vacant/Occupied Positions by Agency and HR Processing Unit report?

    b. Monthly – beginning of each month

2. What are some possible uses for the *Positions with Invalid ChartStrings* report?

    d. Both a and b

3. What kind of additional help is available about reports?

    d. Both a and b

Please continue to the *Conclusion.*

Summary

In this guide, you learned how to use SEMA4 to view job code information, establish new positions, and update and correct position information.

Objectives

This guide included the following topics:

- *Viewing Job Code Information*
  You learned how to view job code information in SEMA4 Help. You found job code information on the Job Code Table and Job Code Option Table. You also viewed the Salary Grades table.
- *Establishing a New Position*
  You established a new position in SEMA4. You entered information about a position and its funding.
- *Viewing Position Information*
  You viewed position data, and viewed summarized information on the Position Summary page. You viewed a position's history and compensation on the Position History page.
- *Putting a Position on Hold*
  You learned why a position is put on hold.
- *Selecting Reason Codes for Changes to Position Records*
  You reviewed effective dates, and identified the relationship between position data and job data. Using SEMA4 Help, you selected the appropriate reason codes for changes to position information. You entered changes to position records and the incumbent's job data record. You inactivated a position.
- *Correcting Position Information*
  You corrected errors in a position record.
- *Using Standard Reports on Position Management Information*
  You referred to SEMA4 Help to find out about standard reports on position management information.

Evaluation Form

Complete the Evaluation form on the next page and return it to SEMA4 HR Services. Thank you for participating!

Position Management

Your Name (Optional) ___________________________ Date ____________________

Agency _______________________________________

Check the box which best describes what you have learned.

Vocabulary	I fully understand	I am slightly confused	I do not understand	Was not addressed
Job Code				
Position				
Action and Reason				
Position Number				
Concepts				
Effective dates				
Adding an effective-dated row				
Update/Display, Include History, Correct History				
On hold vs. inactivate				
Incumbent(s) of a position				
Processes				
View job code information				
Find Check Lists in SEMA4 Help				
Establish a new position				
Enter position funding information				
View position information				
Put a position on hold				
Update information in a position record				
Update position information in incumbent's Job Data				
Inactivate a position				
Correct position information				
Find report descriptions in SEMA4 Help				

In what ways will you apply what you have learned in this guide?

Write any other comments below. Thank you!