



AASBO – February 2020

Position Control as a Management Tool

Objectives of Position Control

- Ensure that all Employees are Assigned to Authorized and Funded Positions
- Streamline Workflow Between HR and PR
- Eliminate Redundant Data Input
- Support Checks & Balances Between Departments
- Historical Views of Positions and Employee Assignments
- Track Vacant and Filled Positions
- Reporting of Job & FTE Distribution
- Optional Budget Checking Based on FTE Allocations
- Optional Board Agenda Reporting
- Optional Approval Process for New Positions

Position Control Basics – Master Position

- Master Positions are Defined by:
 - Location (Where)
 - Job Code (What)
 - Salary Range – determined by lowest and highest salary for the Salary Schedules checked in Job Code Maintenance

PC/PSCM:Position Control Maint Position#1227 - Loc: 0010 JobCd: 0506

Position Number: 1227 Created By: charlotteH 12/8/2009 [Comments](#)

Position Location: 0010 HIGH SCHOOL [View Employee Data](#)

Job Code: 0506 HOME ECONOMICS TEACHER AMY -08/09/2013

Seq/Group: 0 TEACHER

1. General 2. Funding 3. Approval

Description: HOME ECONOMICS TEACHER

Document Loc: [Browse](#) [View](#)

Status/Date: F 07/19/2013 Filled

Type: FT Full-Time Allow Multiple Employees To Fill This Position at Same Time (Additional and Sub Positions)

Class: IN Instructional Exclude Matching Insurance From Budget

Salary From: 36,213.00 Thru: 62,182.00

Requested By: michelle Date: 12/08/2009 Funding Approved Amount: 50,057.00

Needed By: 08/09/2013 Ends: 04/07/2014 Total FTE: 1.00

Position Control Basics – Master Position

- Funding of Position
 - GL Account and FTE (How Many)
 - Budgeted Salary (How Much) – used for Vacancies during budgeting process when Salary Work table field “HR Salary Work Name” field is checked.

PC/PSCM:Position Control Maint Position#1227 - Loc: 0010 JobCd: 0506

Position Number: 1227 Created By: charlotteH 12/8/2009

Position Location: 0010 HIGH SCHOOL

Job Code: 0506 HOME ECONOMICS TEACHER AMY D -08/09/2013

Seq/Group: 0 TEACHER

1. General **2. Funding** **3. Approval**

Fiscal Year: 2014 G/L Acct: No Account Selected Admin Decision

Position Budget Amount: 50,057.00 FTE: .00 Amount: 0.00 Budgeted Funding

Fiscal Y...	Account Number	Amount	FTE	Budgeted	Admin Dec
2014	11-5-1100-010-0010-1110-0-3800-0000	50,057.00	1.00	No	No

Position Control Basics – Employee Assignment

- Positions are Filled by:
 - Employees (Who)
 - Duration (When)
- History Displayed for Positions Held by the Employee

The screenshot shows a software window titled "HR/PERM Name: AMANDA, AMANDA W SSN: 111-22-1441 HQ: Approved Cert: Certified (v3.35)". Below the title bar is a header row with fields for Employee # (5261), Name (ANDA, AMANDA W), SSN, Person Id (1441), Current Form (Position Data), and Document. There are "Next" and "Previous" buttons to the right. Below this is a "Show/Add Position" button and a table with the following data:

Position#	Position Desc / Detail Job Desc	PLoc	Job Code	Emp #	Job#	Date Began	Date Ended	Annual Sal	Rpt Loc
245	HANDICAP PROG GR 1-6	0083	C2300	5261	1	8/16/1994	1/31/2012	56,616.00	0083
251	GENERAL SCIENCE PROG	0080	C1542	5261	1	2/1/2012		56,616.00	0080

HR Department

- Enters Personnel Actions (New Hires, Transfers, etc.) Generates Personnel Action Forms (PAFs)
 - PAF Contains Details of the Personnel Action (Before & After)
 - PAF is Assigned a Payroll ‘Pull’ Date (Usually a Future Date)
 - PAF Format is Customized for Each School District
 - PAF Automatically Stored as Attached Electronic Document
- HR’s Pending Personnel Actions are Isolated from PR’s Data
 - New Employees May be Added Without Affecting Current PR
 - Terminations and Transfers May be Well Before the PR Effective Date

Position Control Basics – PR Interface

Sample PAF

ALSDE Board of Education DIVISION OF HUMAN RESOURCES Personnel Action Form			
LYDIA D LYDIA 0010 Cost Center 0010 Pos Title: PRINCIPAL (N-6) Job Title: PRINCIPAL (N-6)	Employee: 8904 123 MAIN STREET MONTGOMERY, AL 36101 Phone: (334)555-1212	SSN: 111-22-1854 Ethnicity: African Americ Gender: Female Salary: \$ 93,462.00	Current Date: 01/17/2012 Hire: 08/10/1998 Tenure: 08/10/2001 DOB: 09/05/1964
FOR HUMAN RESOURCES PURPOSES ONLY			
Pos Ctl No: 9	Board Date: 12/31/2011	PR Pull Date	02/01/2012
Rpt Loc: Cost Center 0010	Empl Status: Terminated Retired	Job Status: Terminated Retired	Degree: DOCTORATE Certified Flag: Certified
Job Code: PRINCIPAL (N-6)	FTE: 1.00	From: 8/10/1998	To: 12/31/2011
FOR PAYROLL DEPARTMENT PURPOSES ONLY			
Federal	Retirement Elig	Work Mon. Per Year	Pay Cycle Sick Bank Member
S-0	Yes	12	Monthly Yes
<u>Previous Information</u>		from	<u>Current Information</u>
Job: 1	Status: A	Empl Type: P	Job: 1 Status: T Empl Type: P
Salary Schedule: P3	Rank: 00	Step: 13	Salary Schedule: P3 Rank: 00 Step: 13
Annual Salary: 93,462.00	Rate: 389.43		Annual Salary: 93,462.00 Rate: 389.43
Hours/Day: 7.00	%Wk: 100.00%	Cont Days: 240.00	Hours/Day: 7.00 %Wk: 100.00% Cont Days: 240.00
CCTR: 0010	Cost Center 0010		CCTR: 0010 Cost Center 0010
GL Distribution:	2012		GL Distribution: 2012
Fd-C-Func-Obj-Cctr-SFnd-Y-Prog-Spec			Fd-C-Func-Obj-Cctr-SFnd-Y-Prog-Spec
11-5-2310-022-0010-1110-0-8230-0000	100.00%		11-5-2310-022-0010-1110-0-8230-0000 100.00 %
<u>Additional Information For Internal Use Only</u>			
Note to Payroll: Please calculate payment for unused Sick, Personal and Vacation Leave and include it in the last payment to Lydia.			

Position Control Basics – PR Interface

PR Department

- PR Receives the Pending Personnel Action Forms (PAFs) from HR
- PR Reviews PAFs to the 'Pull' (Update) and May Contact HR Regarding Questions or Concerns
- PAFs are Updated by PR at the Appropriate Time (Based on the PR Processing Schedule)
 - Typically, Terminations are 'Pulled' in Early September After the Final August Payment
 - Typically, New Hires are 'Pulled' in Early August or September Prior to the Employee's First Payment
- PR Completes Any Missing Employee Information, Including the Pay Period Salary

Position Control Basics – PR Interface

Update Payroll from HR (PR Pull)

PR/UPPR: Update Payroll from HR (v3.24)

Update Batch
 Update Individual
 Inactivate Deductions on Terminations
 Calculate Pay Period Salary

Payroll Pull Date: 10/31/2016
Default Federal Tax Status: S
Default State Tax Code: S

Job Pay Period

Type	Description
<input checked="" type="checkbox"/> B	Bi-Weekly
<input checked="" type="checkbox"/> M	Monthly
<input checked="" type="checkbox"/> N	No Pay
<input checked="" type="checkbox"/> S	Semi-Monthly
<input checked="" type="checkbox"/> W	Weekly

Job Status

Type	Description
<input checked="" type="checkbox"/> A	Active
<input checked="" type="checkbox"/> L	On Leave
<input checked="" type="checkbox"/> P	Approved
<input checked="" type="checkbox"/> R	Resigned
<input checked="" type="checkbox"/> S	Superseded

Report Destination

To Printer Office - Fred
 To Report Viewer
 To File

Enter Selection Criteria, Click Enter(F1) To Execute

PR/UPPR: Update Payroll from HR (v3.09)

Notice#	Emp#	Job#	Name	SSN #	Pos#	Pull Date	Location
<input checked="" type="checkbox"/> 61	8904	1	LYDIA, LYDIA D	111-22-1854	9	2/1/2012	0010
<input checked="" type="checkbox"/> 62	12722	1	WILLIAMS, MARTIN	777-88-9999	9	2/1/2012	0010

Select Records to Update to Payroll
Click Save to Update

Position Control Basics

Active Distribution Report – Job or GL Location

HR/APND: Active Personnel Distribution (v3.15)

Distribution Option

Job Location GL Cost Center

Job Location From: Thru:

Active Thru Date: Fiscal Year: 2018

Print In Job Location Order

Include Vacancies

Suppress Salary

Personnel Status Codes

Sta...	Description
<input checked="" type="checkbox"/> A	Active
<input checked="" type="checkbox"/> L	On Leave
<input checked="" type="checkbox"/> P	INTERIM
<input checked="" type="checkbox"/> R	Retired
<input checked="" type="checkbox"/> S	Substitute

Personnel Certified Codes

Code	Description
<input checked="" type="checkbox"/> C	Certified
<input checked="" type="checkbox"/> N	Non-Certified
<input checked="" type="checkbox"/> S	Substitute

Employee Job Codes

Code	Description
<input checked="" type="checkbox"/> 010...	PRINCIPAL N-12
<input checked="" type="checkbox"/> 010...	PRINCIPAL N-8
<input checked="" type="checkbox"/> 010...	PRINCIPAL 4-8
<input checked="" type="checkbox"/> 010...	PRINCIPAL 7-12
<input checked="" type="checkbox"/> 010...	PRINCIPAL 8-8
<input checked="" type="checkbox"/> 010...	PRINCIPAL K-8
<input checked="" type="checkbox"/> 010...	ADMINISTRATIVE LIAISON
<input checked="" type="checkbox"/> 020...	ASST PRIN N-12
<input checked="" type="checkbox"/> 020...	ASST PRIN N-8
<input checked="" type="checkbox"/> 020...	ASST PRIN 4-8
<input checked="" type="checkbox"/> 020...	ASST PRIN 7-12
<input checked="" type="checkbox"/> 020...	ASST PRIN OF INSTR 7-12
<input checked="" type="checkbox"/> 020...	ASST PRIN OF INSTR 4-8

Job Types

Type	Description
<input checked="" type="checkbox"/> A	Additional ...
<input checked="" type="checkbox"/> P	Primary Job
<input checked="" type="checkbox"/> S	Suppleme...

Position Class Codes

Class	Description
<input checked="" type="checkbox"/> AC	Administra...
<input checked="" type="checkbox"/> AL	Administra...
<input checked="" type="checkbox"/> BS	Building S...
<input checked="" type="checkbox"/> CN	Child Nutrit...

Position Control Basics

Active Distribution Report – Job or GL Location

RUN DATE: 04/07/2014

MCAI HUMAN RESOURCES SYSTEM

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RUN TIME: 04:28AM

ACTIVE PERSONNEL DISTRIBUTION BY JOB CODE REPORT

HRAPNDJob

REPORT PARAMETERS SELECTED: JOB CODE LOCATION - ALL, CERTIFICATION STATUS - ALL, PERSONNEL STATUS - ALL

<u>JOB CODE AND DESCRIPTION</u>	<u>LOCATION</u>	<u>EMP #</u>	<u>JOB NAME</u>	<u>RACE</u>	<u>ANNUAL SAL</u>	<u>FTE SAL</u>	<u>FTE</u>	<u>POS HIRE DATE</u>	<u>PAY PER</u>	<u>EMPL TYPE</u>	<u>HRS/ DAY</u>
MT02	BUS DRIVER - FULLTIME										
0050		1109	0 VACANCY(HOWSE)	V	13,851.00	13,851.00	1.00	04/07/2014	M	Vac	0.00
0070		15941	1 ANDERSON		12,785.00	12,785.00	1.00	08/14/2013	M	BD	4.00
0040		14843	1 BAKER, LIN		14,385.00	14,385.00	1.00	01/02/2013	M	BD	4.00
0011		13928	1 BAKER, ME		13,304.00	13,304.00	1.00	11/07/2005	M	BD	4.00
0040		12001	1 BELL, MELF		14,385.00	14,385.00	1.00	03/01/1999	M	BD	4.00
0040		12748	1 BELL, TROY		13,851.00	13,851.00	1.00	10/02/2000	M	BD	4.00
0011		12829	1 BERRY, AL		13,851.00	13,851.00	1.00	08/02/2001	M	BD	4.00
0061		12515	1 BLAKEY, HI		13,851.00	13,851.00	1.00	08/03/2000	M	BD	4.00
0062		15571	1 BOATNER,		12,785.00	12,785.00	1.00	08/16/2012	M	BD	4.00

Position Control Basics

Active Distribution Report – Job or GL Location

RUN DATE: 04/07/2014

MCAI HUMAN RESOURCES SYSTEM

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RUN TIME: 04:28AM

ACTIVE PERSONNEL DISTRIBUTION BY JOB CODE REPORT

HRAPNDJob

REPORT PARAMETERS SELECTED: JOB CODE LOCATION - ALL, CERTIFICATION STATUS - ALL, PERSONNEL STATUS - ALL

<u>JOB CODE AND DESCRIPTION</u>	<u>LOCATION</u>	<u>EMP #</u>	<u>JOB NAME</u>	<u>RACE</u>	<u>ANNUAL SAL</u>	<u>FTE SAL</u>	<u>FTE</u>	<u>POS HIRE DATE</u>	<u>PAY PER</u>	<u>EMPL TYPE</u>	<u>HRS/ DAY</u>
MTD2	BUS DRIVER - FULL TIME										
0060		15958	1 WELC	1	10,059.84	10,059.84	1.00	10/09/2013	M	8D	4.00
0021		11361	1 WELD	1	14,385.00	14,385.00	1.00	02/21/1997	M	8D	4.00
0072		13156	1 WHEE	1	13,851.00	13,851.00	1.00	08/02/2002	M	8D	4.00
0030		15431	1 WICKS	1	13,138.00	13,138.00	1.00	11/19/2010	M	8D	4.00
0021		11980	1 WILLI	1	14,385.00	14,385.00	1.00	09/07/1999	M	8D	4.00
0062		11617	1 WILLI	1	14,385.00	14,385.00	1.00	04/07/1997	M	8D	4.00
0061		14548	1 WILLI	2	13,138.00	13,138.00	1.00	12/03/2007	M	8D	4.00
0011		15710	1 WILSO	1	12,785.00	12,785.00	1.00	08/16/2012	M	8D	4.00
0061		15938	1 WYNN	1	12,785.00	12,785.00	1.00	08/14/2013	M	8D	4.00
0062		15942	1 YOUNI	1	12,785.00	12,785.00	1.00	08/14/2013	M	8D	4.00

TOTAL PERSONNEL FOR JOB CODE MTD2 118.00

Position Control Basics

Active Distribution Report – Job or GL Location

RUN DATE: 04/07/2014
 RUN TIME: 04:53AM

MCAI HUMAN RESOURCES SYSTEM
 ACTIVE PERSONNEL DISTRIBUTION BY LOCATION REPORT

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 HRAPNDLoc

REPORT PARAMETERS SELECTED: JOB CODE LOCATION - ALL, CERTIFICATION STATUS - ALL, JOB CODE STATUS - ALL

<u>JOB CODE AND DESCRIPTION</u>	<u>LOCATION</u>	<u>EMP #</u>	<u>NAME</u>	<u>RACE</u>	<u>ANNUAL SAL</u>	<u>DIST SAL</u>	<u>FTE</u>	<u>POS HIRE DATE</u>	<u>PAY PER</u>	<u>EMPL TYPE</u>	<u>HRS/ DAY</u>
<u>LOCATION: 0010</u> <u>I HIGH SCHOOL</u>											
SC20	SCHOOL SECRETARY										
		10174	LONG,	1	23,629.00	23,629.00	1.00	1986-08-31	M	SD	7.50
							-----	TOTAL PERSONNEL FOR JOB CODE SC20			1.00
SC21	SCHOOL SECRETARY/BOOKKEEPER										
		14433	FOLDS,	1	24,093.00	24,093.00	1.00	2013-05-28	M	B2	7.50
							-----	TOTAL PERSONNEL FOR JOB CODE SC21			1.00
SS15	HEALTH NURSE										
		15193	ALEXANDER,	2	24,716.00	24,716.00	1.00	2009-08-03	M	NC	7.50
							-----	TOTAL PERSONNEL FOR JOB CODE SS15			1.00
							-----	TOTAL PERSONNEL FOR JOB CODE LOCATION 0010			73.00

Position Control Basics

Faculty By School Report – Position Location/GL Comp

HR/FBSR: Faculty by School Report (v3.04)

Fiscal Year: 2016

Select Up to 5 Experience Codes

Code	Description
<input checked="" type="checkbox"/> OTH	Support/Classified Experie.
<input checked="" type="checkbox"/> PRV	Private School Certified Ex.
<input checked="" type="checkbox"/> PUB	Non-Alabama Public Scho..
<input checked="" type="checkbox"/> ST	Alabama Public School Ce.
<input checked="" type="checkbox"/> SYS	Certified Experience

Personnel Certified Codes

Type	Description
<input type="checkbox"/> C	Certified
<input type="checkbox"/> N	Non-Certified
<input type="checkbox"/> S	Substitute

Select GL Component

Report By:

Position/Job Location

GL Component

Mask SSN on Report

Report Destination:

To Report Viewer To Grid To File

To Printer Office - Fred

Setup

Enter Selection Criteria, Click Enter(F1) To Generate Report

Position Control Basics

Faculty By School Report – Position Location/GL Comp

RUN DATE: 4/7/2014
 RUN TIME: 5:28:17AM

MCAI HUMAN RESOURCES SYSTEM
 PERSONNEL BY SCHOOL REPORT

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 HRFBSR

CERTIFICATED REPORTED Certified

<u>NAME</u>	<u>Fd-C-Func-Obj-CCtr-SFnd-Y-Prog-Spec</u>	<u>JOB</u>	<u>CODE</u>	<u>GL FTE</u>	<u>FTE SALARY</u>	<u>GL%</u>	<u>%SALARY</u>
POSITION LOCATION 0010 HIGH SCHOOL							
AHMED	SSN: 419-21-7110 DEGREE: 2 11-5-1100-010-0010-1110-0-1500-0000	1	0511	1.00	53,038.00	1.00	53,038.00
Experience: OTH=0 PRV=0 PUB=48 ST=0 SYS=155							
BAXLEY	SSN: 427-59-3636 DEGREE: 2 11-5-1100-010-0010-1110-0-1500-0000	1	0504	1.00	46,867.00	1.00	46,867.00
Experience: OTH=0 PRV=0 PUB=0 ST=10 SYS=35							
BRAUN ,	SSN: 420-33-9049 DEGREE: 1 11-5-1100-010-0010-1110-0-1500-0000	1	0502	1.00	41,028.00	1.00	41,028.00
Experience: OTH=0 PRV=0 PUB=0 ST=0 SYS=48							
BROWN	SSN: 424-25-0445 DEGREE: 2 11-5-1100-010-0010-1110-0-1500-0000	1	0503	1.00	50,984.00	1.00	50,984.00
Experience: OTH=0 PRV=0 PUB=0 ST=0 SYS=144							
CARTER ,	SSN: 424-84-4092 DEGREE: 1 11-5-1100-010-0010-1110-0-1500-0000	1	0504	1.00	45,548.00	1.00	45,548.00
Experience: OTH=0 PRV=0 PUB=0 ST=96 SYS=84							
CHASTAIN ,	SSN: 417-11-3867 DEGREE: 1 11-5-1100-010-0010-1110-0-1500-0000	1	0501	1.00	45,298.00	1.00	45,298.00
Experience: OTH=0 PRV=0 PUB=6 ST=6 SYS=150							

Optional PC Component – Budget Checking

- HR Parameter Maintenance – Position Control Options
 - Check Budget for Position Control
 - Restrict/Warn user Exceeding FTE/Budget
 - Allocation Component
 - Allocation Version

The screenshot displays the 'HR/PAF: HR Parameter Maintenance (v3.05)' application window. The 'Installation ID' is 'Cenoff'. The '2. Position Control' tab is active, showing various configuration options. The 'Position Control Enabled' checkbox is checked. Under 'Check Budget for Position Control', the 'Warn User Exceeding FTE Allocation' and 'Warn User Exceeding Budget Amt' checkboxes are checked, while 'Restrict User Exceeding ETE Allocation' and 'Restrict User Exceeding Budget Amt' are unchecked. The 'Allocation Component' is set to 'ObjCCSFund', 'Job Code Component' is 'Object', and 'Allocation Version' is empty. The 'Last PAF Notice Number' is 2645. A red text instruction at the bottom reads: 'Change Mode: Enter the Key Word for the Record to be Changed'.

HR/PAF: HR Parameter Maintenance (v3.05)

Installation ID: Cenoff

1. General 2. Position Control 3. Applicant Tracking

Position Control Enabled

Approval Codes Enabled

Auto Generate Position Control #

Last Generated Position #: 1651

Check Budget for Position Control

Restrict User Exceeding ETE Allocation

Warn User Exceeding FTE Allocation

Restrict User Exceeding Budget Amt

Warn User Exceeding Budget Amt

Last PAF Notice Number: 2645

Do Not Print PAF When Generated

Do Not Export PAF When Generated

Print Standard PAF Report

Board Reporting Enabled

Allocation Component: ObjCCSFund

Job Code Component: Object

Allocation Version:

Change Mode: Enter the Key Word for the Record to be Changed

Optional PC Component – Budget Checking

- Allocations for Budget Checking:
 - Cost Center (Where)
 - Object Code (What)
 - Funding Source (Foundation, Federal, Local, etc.)
 - Total FTE (How Many)
 - Total Salary Budget (How Much)
 - CCTR Enrollment

PC/ALLM: Allocation Maintenance (vhralloc)

Fiscal Year: 2012 Version: FY12-1 Source of Funds/CCTR/Object Value: 010-0010-1110 Group Code: C 1

TEACHER - Cost Center 0010 - FOUNDATION PROGRAM

Budget Qty: 37.00 Additional Qty: 0.00 Administrative Decision Qty: 0.00 Total Qty: 37.00

Budget Amt: 1,665,000.00 [Add/Update Listview](#)

CCTR	Comp Value	Description	QTY	Amount	Enroll
0010	010-0010-1110	TEACHER - Cost Center 0010 - FOUNDATION PROGRAM	37.00	1,665,000.00	532
0010	022-0010-1110	PRINCIPAL (N-6) - Cost Center 0010 - FOUNDATION PROGRAM	1.00	94,000.00	532
0010	032-0010-1110	ASST PRINCIPAL (N-6) - Cost Center 0010 - FOUNDATION PROGRAM	1.00	77,000.00	532
0010	042-0010-1110	COUNSELOR (N-6) - Cost Center 0010 - FOUNDATION PROGRAM	1.00	43,000.00	532
0010	072-0010-1110	LIBRARIAN (N-6) - Cost Center 0010 - FOUNDATION PROGRAM	1.00	57,000.00	532

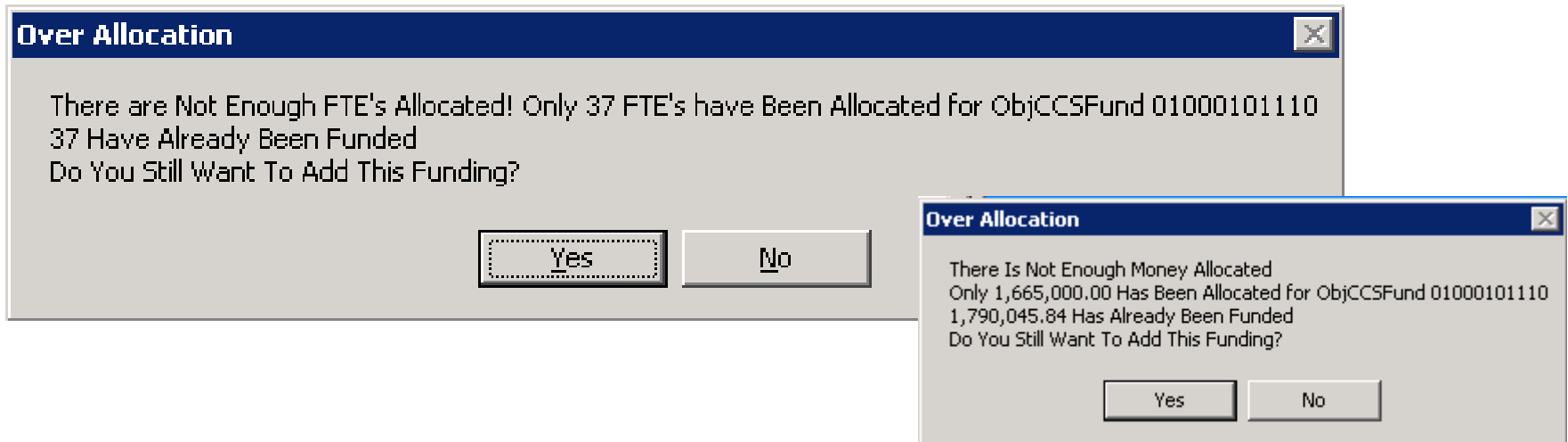
Optional PC Component – Budget Checking

- Allocation Worksheet Report – List of FTEs and Budget Amounts from the Allocation Master

OBJECT/COST CENTER/SFUND	ALLOCATIONS	BUDGETED AMOUNT
01000011275	_____	_____
01000011810	_____	_____
01000013310	_____	_____
01000014160	_____	_____
01000015930	_____	_____
01000016681	_____	_____
01000016683	_____	_____
01000016688	_____	_____
01000211110	0.11	5,819.55
01000211110	22.00	988,172.10
01000211110	5.00	248,917.00
01000214110	1.00	47,721.00
01000214130	1.00	48,362.00
01000351110	26.00	1,082,317.00

Optional PC Component – Budget Checking

- Budget Checking Options
 - Restrict User Exceeding FTE Allocation
 - Warn User Exceeding FTE Allocation
 - Restrict User Exceeding Budget Amount
 - Warn User Exceeding Budget Amount



Optional PC Component – Budget Checking

- Budget Checking Options

- Over Allocation Warning is displayed because 85.06 FTE's have been allocated to 010-0230-1110 and the Position Control Master already contains 90.06 FTE's funded by 010-0230-1110. Note: If a Vacant Position is being Deleted or Frozen, delete the funding record(s) to reduce the total existing FTE's.

The screenshot shows the 'PC/PSCM: Position Control Maint (v3.01)' application window. The 'Funding' tab is active, displaying the following information:

- General:** Position Number (blank), Position Location: 0230, Job Code: 101402, PHYSICAL EDUCATION, Seq/Group: 1 TEACHER.
- Funding:** Fiscal Year: 2009, G/L Acct: 11-5-1100-010-0230-1110-0-1500-0000, Allocation Version: 080520, INSTRUCTION, TEACHER-SALARIES.
- Amounts:** Position Budget Amount: 36,144.00, FTE: .00, Amount: 36,144.00. The 'Budgeted Funding' checkbox is checked.

An 'Over Allocation' dialog box is overlaid on the screen with the following text:

Over Allocation

There are Not Enough FTE's Allocated! Only 85.06 FTE's have Been Allocated for ObjCCSFund 01002301110 90.06 Have Already Been Funded
Do You Still Want To Add This Funding?

Buttons: Yes, No

Optional PC Component – Reporting

- Assigned Pos by ObjCCSFund – Allocation Query

PC/ALLQ: Assigned Pos by ObjCCSFund (v3.00)

Fiscal Year: 2009

ObjCCSFund	Description	Allocati...	Amount
01002301110	TEACHER-SALARIES - DAVIDSON HIGH SC...	84.06	3,872,608.16
01002301252	TEACHER-SALARIES - DAVIDSON HIGH SC...	1.00	36,144.00
01002305930	TEACHER-SALARIES - DAVIDSON HIGH SC...	1.00	59,220
01002306001	TEACHER-SALARIES - DAVIDSON HIGH SC...	1.00	49,239
01002401110	TEACHER-SALARIES - DIXON ELEMENTAR...	26.00	1,209,271
01002401410	TEACHER-SALARIES - DIXON ELEMENTAR...	1.00	48,362
01002404110	TEACHER-SALARIES - DIXON ELEMENTAR...	1.50	71,135
01002451110	TEACHER-SALARIES - DR. ROBERT W GILL...	42.05	1,836,244
01002453210	TEACHER-SALARIES - DR. ROBERT W GILL...	1.00	45,720
01002454110	TEACHER-SALARIES - DR. ROBERT W GILL...	1.20	55,879
01002501110	TEACHER-SALARIES - DUNBAR MIDDLE SC...	30.02	1,375,243
01002504110	TEACHER-SALARIES - DUNBAR MIDDLE SC...	1.34	62,660
01002506001	TEACHER-SALARIES - DUNBAR MIDDLE SC...	2.66	124,852

Enter Selection Criteria, Click Enter(F1) To Execute Query

Total FTE's for assigned Position Data records funded by 010-0230-1110 = 84.06; Total Amount = \$3,872,608.16

PC/ALLQ: Assigned Pos by ObjCCSFund (v3.00)

Fiscal Year: 2009 ObjCCSFund: 01002301110

Pos#	Description	Loc	Job Cd	Stat	Type	Alloc	Amount
9206	PHYSICAL EDUCATION	0230	101402	F	EXI	1.00	50,365.00
9313	SPECIAL ED TEA	0230	100921	F	EXI	1.00	41,564.00
9347	SOCIAL STUDIES	0230	100808	F	EXI	1.00	42,818.00
9348	BIOLOGY	0230	100701	F	EXI	1.00	51,014.00
9603	BUSINESS EDUCATION PREP	0230	101010	F	EXI	1.00	49,238.00
9683	DRIVER EDUCATION	0230	102201	F	EXI	1.00	41,497.00
9908	MATHEMATICS	0230	100504	F	EXI	1.00	50,365.00
9923	SPECIAL ED TEA	0230	100921	F	EXI	1.00	55,932.00
10265	ENGLISH	0230	100201	F	EXI	1.00	45,546.00
10286	HISTORY	0230	100804	F	EXI	1.00	48,362.00
10333	FRENCH	0230	100402	F	EXI	1.00	48,362.00
10351	BIOLOGY	0230	100701	F	EXI	1.00	48,362.00
10370	SPECIAL ED TEA	0230	100921	F	EXI	1.00	48,362.00

Enter Selection Criteria, Click Enter(F1) To Execute Query

List of all assigned Position Data records funded by 010-0230-1110

Optional PC Component – Reporting

- Assigned Pos by ObjCCSFund – Allocation Query
 - Detail of an assigned Position Data record funded by 010-0230-1110

PC/ALLQ: Assigned Pos by ObjCCSFund (v3.00)

Fiscal Year: 2009 ObjCCSFund: 01002301110 Back

Pos#	Description	Loc	Job Cd	Stat	Type	Alloc	Amount
9206	PHYSICAL EDUCATION	0230	101402	F	EXI	1.00	50,365.00
9313	SPECIAL ED TEA	0230	100021	F	EXI	1.00	41,564.00
9347	SOC						
9348	BIC						
9603	BUS						
9683	DR						
9908	MA						
9923	SPE						
10265	ENC						
10286	HIS						
10333	FRE						
10351	BIC						
10370	SPE						

HR/PCDT Position Control Detail

Position Number: 9206 PHYSICAL EDUCATION Print Close

Location: 0230 - DAVIDSON HIGH SC Employee: - 80970

Job Code: 101402 - PHYSICAL EDUCA' Report Loc: 0230 - DAVIDSON HIGH SC

Status: F - Filled - 08/25/2008 Contract Status: MC - MAIL CONTRACT

Type: EXI - Existing Position Job/Empl Type: 1 - T9 - TEACHER - 9 MONTH

Class: IN - Instructional

Salary Range: .00 - 50,365.00 Contract Days: 37.00 Annual Salary: 50,365.00

Benefited: No Hours Per Day: 7.00 Pay Period Salary: .00

Budget Amt/Fte: 50,365.00 1.00 Rate of Pay: 269.33

View Approval Data

Salary Schedule Data

Sal Sched	Related ...	A...	Sup Amt	Sup Pct
40 - A - 18		Yes	.00	.00%

Distribution Data

Year	Account Number	Percent	Amou
2009	11-5-1100-010-0230-1110-...	100.00%	.0

Enter Selection Criteria, Click Enter(F1) To Execute Query

Optional PC Component – Reporting

- Position Control by GL Component Report
 - Lists and Counts positions for all or selected Positions Statuses by Location (school) and Job Code and Position Classes

PC/MALL: PC By GL Component Report (v3.04)

Fiscal Year: 2016 Mask SSN on Report

Locations

Loc	Description
<input checked="" type="checkbox"/> 0000	Cost Center 0000
<input checked="" type="checkbox"/> 0001	COST CENTER
<input checked="" type="checkbox"/> 0010	HARRIS ELEMENTARY SCHOOL
<input checked="" type="checkbox"/> 0020	RAINBOW ELEMENTARY
<input checked="" type="checkbox"/> 0030	COLUMBIA ELEMENTARY

Status Codes

Status	Description
<input checked="" type="checkbox"/> F	Filled
<input checked="" type="checkbox"/> N	New
<input checked="" type="checkbox"/> T	Terminated
<input checked="" type="checkbox"/> V	Vacant
<input checked="" type="checkbox"/> Z	Frozen

Job Codes

Status	Description
<input checked="" type="checkbox"/> C0010	ON LOAN TO STATE
<input checked="" type="checkbox"/> C0012	SECONDARY ALT TEACHER
<input checked="" type="checkbox"/> C0014	TEACHER-GIFTED
<input checked="" type="checkbox"/> C0022	PRINCIPAL (N-6)
<input checked="" type="checkbox"/> C0024	PRINCIPAL (7-12)

Position Classes

Class	Description
<input checked="" type="checkbox"/> AC	ADMINISTRATORS
<input checked="" type="checkbox"/> BS	BUILDING SERVICES
<input checked="" type="checkbox"/> CN	CHILD NUTRITION PROGRAM
<input checked="" type="checkbox"/> CT	CONTRACT
<input checked="" type="checkbox"/> ED	EXTENDED DAY
<input checked="" type="checkbox"/> IN	INSTRUCTIONAL

Select By GL Component

Report Destination:
 To Printer To Grid To File
 To Report Viewer Office - Fred

Optional PC Component – Reporting

- Position Control by Object Report

RUN DATE: 05/01/2017
 RUN TIME: 04:07PM

MCAI HUMAN RESOURCES SYSTEM
 MASTER ALLOCATIONS LISTING

<u>POSITION</u>	<u>JOB CODE</u>	<u>NAME</u>	<u>EMPLOYEE TYPE</u>	<u>PC FTE</u>
24357	WRITING COACH	Vacant Position		1.00
**Object 010 TOTALS				4,711.25
Object 011				
12854	ARI READING LITERACY COACH	Vacant Position		0.10
18784	ARI READING LITERACY COACH	Vacant Position		0.44
23256	ARI READING LITERACY COACH	Vacant Position		0.28
15029	COMPUTER EDUCATION	Vacant Position		1.00
22706	ESL/LANGUAGE ARTS TEACHER		TEACHER - 9 MONTH	1.00
22189	GRADE 2			1.00
24304	INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
25016	INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
14709	INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
23277	INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
21100	INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
21129	INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
21102	INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
24106	INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
18790	INTERVENTION TEACHER			1.00
22169	INTERVENTION TEACHER			1.00
18941	LANGUAGE ARTS			1.00
24402	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
23874	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
24775	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
23255	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
24322	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
23263	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
22818	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
22499	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
23968	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
23581	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
23904	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00
24007	MATH INTERVENTION TEACHER		TEACHER - 9 MONTH	1.00

Optional PC Component – Reporting

- PC Analysis Report – List summary or detail of Position Control Masters for selected PC Statuses and GL components

PC/PSSV: Analysis Report (v3.01)

Status

Status	Description
<input type="checkbox"/> F	Filled
<input type="checkbox"/> N	New
<input type="checkbox"/> T	Terminated
<input checked="" type="checkbox"/> V	Vacant
<input type="checkbox"/> Z	Frozen

Print Amounts

By General Ledger Distribution

By Position Detail

By Position Summary

Grand Total Only

Select By GL Component

Optional PC Component – Reporting

- PC Analysis Report – The report shows vacancy position detail.

RUN DATE: 05/01/2017
 RUN TIME: 04:17PM

MCAI HUMAN RESOURCES SYSTEM
 POSITION CONTROL ANALYSIS REPORT

Page 1 of 30
 HRPSSV

<u>POSITION #</u>	<u>Fd-C-Func-Obj-CCtr-SFnd-Y-Prog-Spec</u>	<u>AMOUNT</u>	<u>SS</u>	<u>MEDI</u>	<u>SUI</u>	<u>retire</u>	<u>OTHER MAND DED</u>
9200	11-5-4130-161-0050-1310-0-2900-7011	14,696.00					
	TOTAL FOR POSITION #: 9200	14,696.00	911.15	213.09	5.88	0.00	0.00
9269	11-5-1100-010-0730-1110-0-1500-0000	55,391.00					
	TOTAL FOR POSITION #: 9269	55,391.00	3,434.24	803.17	22.16	0.00	0.00
9284	11-5-1100-197-0136-6001-0-4503-0000	7,345.00					
	TOTAL FOR POSITION #: 9284	7,345.00	455.39	106.50	2.94	0.00	0.00
9314	11-5-4120-161-0595-1310-0-8410-7011	7,475.00					
	11-5-4120-161-0470-1310-0-8410-7011	7,475.00					
	TOTAL FOR POSITION #: 9314	14,950.00	926.90	216.78	5.98	0.00	0.00
9342	11-5-2310-143-0550-1110-0-8230-0000	21,265.00					
	TOTAL FOR POSITION #: 9342	21,265.00	1,318.43	308.34	8.51	0.00	0.00
9344	11-5-1100-010-0530-1110-0-1500-0000	53,963.00					
	TOTAL FOR POSITION #: 9344	53,963.00	3,345.71	782.46	21.59	0.00	0.00
9345	11-5-1100-191-0530-6001-0-1621-0000	4,763.00					
	TOTAL FOR POSITION #: 9345	4,763.00	295.31	69.06	1.91	0.00	0.00

Optional PC Component – Reporting

- Position Control Query – Lists Budget FTE and Amount from Position Control Master and Actual FTE and Amount from Position Data Records

PC/PCQY: Position Control Query (v3.02)													
Positi...	P...	Job ...	Status	Type	Bud Y...	Bud ...	Bud Amt	Act...	Act Amt	Act Y...	Pos Description	Pos. ...	Name
9206	02...	101...	Filled	Existi...	2009	1.00	50,365.00	1.00	50,365.00	2009	PHYSICAL ED...	8/6/2...	SMITH, E
9207	02...	XF...	Filled	Existi...	2009	1.00	3,491.00	1.00	3,491.00	2009	TRACK BOYS	8/6/2...	SMITH, ..
9208	02...	XB...	Delet...	Existi...	2009	1.00	3,491.00	0.00	0.00		ASST FOOTBA...		
9226	02...	100...	Filled	Existi...	2009	1.00	51,470.00	1.00	51,470.00	2009	PACE	8/11/...	SMITH, T
9313	02...	100...	Filled	Existi...	2009	1.00	41,564.00	1.00	41,564.00	2009	SPECIAL ED T...	8/21/...	BOUCHE
9347	02...	100...	Filled	Existi...	2009	1.00	42,818.00	1.00	42,818.00	2009	SOCIAL STUD...	8/30/...	EDGE, TF
9348	02...	100...	Filled	Existi...	2009	1.00	51,014.00	1.00	51,014.00	2009	BIOLOGY	8/30/...	FINNEG/
9426	02...	650...	Filled	Existi...	2009	1.00	15,840.00	1.00	15,840.00	2009	CUSTODIAN	10/1/...	DRAKE, S
9469	02...	650...	Filled	Existi...	2009	1.00	19,222.00	1.00	19,222.00	2009	CUSTODIAN	8/21/...	BAXTER,
9603	02...	101...	Filled	Existi...	2009	1.00	49,238.00	1.00	49,238.00	2009	BUSINESS ED...	10/2/...	SHANKL
9683	02...	102...	Filled	Existi...	2009	1.00	41,497.00	1.00	41,497.00	2009	DRIVER EDUC...	8/9/2...	JORDAN,
9684	02...	XH...	Filled	Existi...	2009	1.00	3,491.00	1.00	3,491.00	2009	BASEBALL B...	8/6/2...	JORDAN,
9685	02...	XB...	Delet...	Existi...	2009	1.00	3,491.00	0.00	0.00		ASST FOOTBA...		
9908	02...	100...	Filled	Existi...	2009	1.00	50,365.00	1.00	50,365.00	2009	MATHEMATICS	8/29/...	GOLDM/
9923	02...	100...	Filled	Existi...	2009	1.00	55,932.00	1.00	55,932.00	2009	SPECIAL ED T...	8/29/...	PRICE, K.
9924	02...	DN...	Filled	Existi...	2009	1.00	1,200.00	1.00	1,200.00	2009	DEPTMENT H...	8/6/2...	PRICE, K.
9943	02...	100...	Delet...	Existi...	2009	1.00	41,895.00	0.00	0.00		CHEMISTRY		
10118	02...	670...	Filled	Existi...	2009	1.00	14,004.00	1.00	14,004.00	2009	CNP ASSISTA...	8/8/2...	HOPKINS
10265	02...	100...	Filled	Existi...	2009	1.00	45,546.00	1.00	45,546.00	2009	ENGLISH	8/31/...	CATES, ..
10266	02...	DN...	Filled	Existi...	2009	1.00	1,500.00	1.00	1,500.00	2009	DEPTMENT H...	8/6/2...	GOLDM/
10286	02...	100...	Filled	Existi...	2009	1.00	48,362.00	1.00	48,362.00	2009	HISTORY	8/31/...	STALLW.
10333	02...	100...	Filled	Existi...	2009	1.00	48,362.00	1.00	48,362.00	2009	FRENCH	8/31/...	EDMON.
10351	02...	100...	Filled	Existi...	2009	1.00	48,362.00	1.00	48,362.00	2009	BIOLOGY	8/31/...	BEARDE.

Optional PC Component – Board Reporting

- **School Board Members** are frequently asked to approve personnel change requests submitted by Central Office and the schools in their jurisdiction. These requests include any number of personnel actions including employee hires, terminations, and salary changes. Generally, the Board Agenda Report is produced ‘manually’ by the Human Resources Department, which can be a time-consuming task.
- **The Board Agenda Reporting** module may be used to generate the Board Meeting Agenda using the existing Personnel Actions in the Position Control System, therefore freeing up valuable resources. In today’s environment, where School Systems are being asked to do ‘more with less’, automation of clerical tasks is essential.

Optional PC Component – Board Reporting

- Report Pending Personnel Actions by:
 - Board Action Type (Assignment, Retirement, Voluntary Transfer, etc.)
 - Board Meeting Date
 - Comments
 - Addendum (Optional)

The screenshot displays a software window titled "fmHRPSEF PAF Pull Date Screen". It contains several input fields and a section for optional board report information.

Fields shown:

- Payroll Pull Date: 09/01/2011
- Effective Date: 05/24/2011
- Comment Code: (empty dropdown)
- Board Report Info (Optional):
 - Board Date: 05/24/2011
 - Addendum: A
 - Board Report Code: TRV (Voluntary Transfer)
 - Prior Location: 0030 (BANKS MIDDLE SCHOOL)
 - Prior Job Code: 1005-6 (5TH/6TH GRADE TEACHER 9-)
- Comments: (empty text box)
- Accept and Cancel buttons.

A red error message at the bottom states: "Must Select a Valid Job Code".

Optional PC Component – Board Reporting

- Flexible Board Agenda Reporting and Customized Board Agenda Report using Crystal

Run Date		6/3/2011		City Board of Education		Page 1 of 36	
Run Time		2:03:04PM		Certified Personnel Actions			
				Board Date 05-24-2011			
				Appointment – Format Type 5			
<u>NUMBER</u>	<u>EMPLOYEE NAME</u>	<u>SCHOOL</u>	<u>SALARY</u>	<u>EFFECTIVE DATE RANGE</u>	<u>REMARKS</u>		
C-3387			59,271.00	7/28/2011	ASSISTANT PRINCIPAL		
C-3388			92,192.00	7/1/2011	PRINCIPAL		
				Resignation – Format Type 2			
<u>NUMBER</u>	<u>EMPLOYEE NAME</u>	<u>SCHOOL</u>		<u>EFFECTIVE DATE RANGE</u>	<u>REMARKS</u>		
C-3567				6/1/2011	KINDERGARTEN TEACHER		
C-3683				5/17/2011	LANGUAGE ARTS TEACHER		
				Termination – Format Type 3			
<u>NUMBER</u>	<u>EMPLOYEE NAME</u>	<u>SCHOOL</u>		<u>EFFECTIVE DATE RANGE</u>	<u>REMARKS</u>		
C-3653				8/5/2010 6/1/2011	TERMINATE ONLY FROM COACHING POSITION HEAD VOLLEYBALL COACH		
C-3656				8/5/2010 6/1/2011	TERMINATE ONLY FROM COACHING POSITION CHEERLEADER COACH		
C-3647				8/5/2010 6/1/2011	TERMINATE ONLY FROM COACHING POSITION ASSISTANT FOOTBALL COACH		

Optional PC Component – Approval Process

- Approval Processing for New Positions:
 - Approver (Person or Department)
 - Date Reviewed
 - Approval (Yes or No)
- Position Remains Unapproved (Cannot Fill) Until Final Approval
- Strongly Suggest Budget Department be Included as Approver

1. General		2. Funding		3. Approval	
Approval Code	<input type="text" value="DHD"/> Department Head	<input type="button" value="Email HR Clerk"/>			
<input checked="" type="checkbox"/> Reviewed	Date Reviewed <input type="text" value="01/17/2012"/>	<input checked="" type="checkbox"/> Approved	<input type="button" value="Comments"/>		<input type="button" value="Add/Update Approval"/>
Code	Description	Date Reviewed	Approved	User Approved	
DHD	Department Head	01/17/2012	Yes	mcaisu super user	
DHR	Director of Human Resources		No		
SUP	Superintendent		No		

Position Control for CSFOs

- If you use Position Control, Payroll and Human Resources **must** work together.
 - Pull dates must be accurate or it affects payroll.
 - Need to be able to discuss how unusual circumstances will impact the employee.
 - Finance creates all new PC numbers.

Position Control for CSFOs

- PC can also be used for the following items:
 - Salary Changes/Some Salary Corrections
 - Supplemental Employees
 - Part-time employees such as after school workers
 - Adjunct Instructors

Position Control for CSFOs

- Assists with budget meetings.
 - Active distribution report is used to show the make up of our schools and how many “filled” or “vacant” positions the school currently has.
 - New PCs or created or a deleted based on these meetings. This eliminates over hiring.

Position Control for CSFOs

- Position Control allows us to present our personnel actions in an organized, accurate, and uniform way.
 - Transfers, salary changes, locations, resignations, etc.

Position Control for CSFOs

- We always know where new and existing employees are in the process of onboarding.
 - Are they on the agenda?
 - What changes are being made to the profile?
 - When will the employee start?