Human Resource System

Position Control Manual

Volume 2

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The Human Resource System (HRS) operated by the Los Angeles County Office of Education, is an integrated Personnel, Payroll, and Retirement system. The system serves 100-plus educational agencies and school districts. Extensive information is maintained on over 200,000 employees. Data is accessible and changes can be made on-line real-time.

A variety of reports are generated as a result of the nightly processing of payroll, personnel, and retirement transactions. Numerous personnel functions are supported, such as Department Notification Reports showing TB exams due, evaluations due, leaves of absence pending, credential expirations, etc. Employee history is an important feature that records all history sensitive personnel changes, e.g., promotion, reassignments, leaves, and salary changes. Personnel and other employee data can be extracted for special uses through a special Ad-Hoc Report production capability.

Payroll functions are numerous and include time reporting, payroll production, direct deposit, pay adjustments, pay history, W-2 and W-2C automated corrections. Because HRS uses tables extensively, manual input is substantially reduced when salaries or other table-supported data is revised.

Volume 1: The System Operation Manual includes all basic system features, screens and descriptions, processing rules, and system access information.


A Help Sheet is included in Volumes 1 and 2 that lists SFS personnel to contact for particular subject information. In the event any district is in need of specialized instruction or training, please feel free to contact School Financial Services staff for assistance.
Using this Manual

The manual is in loose-leaf form. SFS anticipates periodic updates offering new material and system enhancements. The loose-leaf format also allows you to insert notebook pages of your own, augmenting the content with your own experience and for noting potential contributions to future HRS updates. In browsing the manual, you will note that there is plenty of white space. The manual has been formatted to provide ample room for your notes and comments. Finally, the manual’s format permits you to easily remove a page or set of pages for duplication. [Permission is granted for non-commercial use.]

Each index separator begins with an introduction to a specific section. In general, each section addresses a specific feature and includes sample screens and examples for application of subject content. Nine main sections are presented: Overview, CDB Information, PCDB Information, EDB Position Control Screen Processes, PCDB Processes, PCDB Forms and Reports, Run Specifications, and Screen References. A table of contents is organized by what you will see on the screen. In addition, a separate index is provided at the back of the manual.

There are several ways to navigate through the manual. If you are using a hard copy manual, at the top of each page is the index separator header. Along with this header is a caption for each sub-section. This feature is particularly useful when you are seeking information about a specific topic but may not be sure where to find it in the table of contents. The index, however, should be the first reference point. If you are using a soft copy manual, simply click on the topic from the Table of Contents, and it will take you directly to that page.

If any district is in need of specialized instruction or training, please feel free to contact the School Financial Services Training Coordinator at sfshrsops@lacoe.edu for assistance or you can visit our website at www.lacoe.edu/hrs_training.
POSITION CONTROL

Overview
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What is the Position Control Data Base (PCDB)?

The Position Control Data Base (PCDB) is a separate area in HRS where information about positions is stored. All position information is stored under the Position Number. Both the current fiscal year positions and the next fiscal year positions can be stored and used in the system.

What is a Position?

A Position is an allocation for staffing authorized in the district's adopted budget. A Position has a specified status, job classification, work location, and labor account distribution. A Position may have multiple incumbents but all incumbents share the same job classification, work location, and labor account distribution. A Position exists completely separate from the employee or employees who occupy it.

How Are Positions Monitored and Controlled

Only the Board can create, modify, or abolish positions. Positions are controlled by monitoring discrepancies between the budget allocation for a position and actual assignments to the position. A district may use either Full-Time-Equivalent (FTE) or Fiscal Year-To-Date (FYTD) Hours paid, (FYTD) Days paid, and (FYTD) Dollars paid to measure the position allocation and assignments. For the monitoring to work, continuous coordination/cooperation is required between Budget, Personnel, and Payroll Departments.

Full-Time-Equivalent (FTE) Counting

FTE counting is designed to support monthly, hourly, and daily jobs where the Board approves a number of full-time salaries. The district translates the number of full-time salaries into job slots or budget positions that are each allocated a full-time salary equivalency (FTE) value.

A school might have a budget allocation for three monthly instructional assistants. The three instructional assistants may be identified as three full-time employees, six half-time employees, or any combination of employees that will not exceed the three full-time salaries in the budget. HRS Position Control will support allocating three positions, each with a FTE count of 1.0; six positions, each with a FTE count of .5; one position with a FTE count of 3.0; or any combination of positions with FTE allocations that equal the three FTE salaries approved in the budget.
HRS POSITION CONTROL

Overview

FYTD Hours, Days, and Pay Monitoring

The FYTD Hours, Days, and Pay monitoring methods are designed to support control of assignments where the position is allocated in Total Fiscal Year-To-Date Hours, Days, or Pay. Position Control is not concerned with how many people are hired, but Position Control is interested in their annual pay and the total hours or days they work.

A position created for substitute teachers may be allocated a total dollar amount of $50,000 for the year. HRS Position Control does not care if 25 or 275 employees are hired to serve as substitutes and are assigned to the substitute position list. Position Control is concerned that the actual pay does not exceed the budget. Position Control will allow the district to monitor position activity by accumulating the Fiscal Year-To-Date Total Pay of each employee paid on the position. The system will provide warning messages on the Position Control Discrepancy Report (POSR060) when the Total Pay reaches 80 percent of the allocated pay for the position ($40,000) and when the Total Pay exceeds the position allocation ($50,000). The same process may be used to monitor other positions by Hours paid or Days paid.

What is a Position Requisition?

A requisition is like a purchase order, an order to fill a position. Position requisitions allow a district to minimize staff allocation problems by monitoring orders to fill positions prior to assignments being implemented. A requisition is usually generated by a request from a unit manager to fill a position. A Position Control requisition is created by entering information on PCDB, Function 10, and Requisition Information Screen (006). A future hire on the EDB will also produce a Position Requisition through the Overnight Batch Processing.

The system supports multiple assignments to a single position and multiple requisitions against the position.
Examples of Information Stored On PCDB Screens

- **Basic Position Information** - Main screen to establish a position and to hold required information for a position. Such as; Job Class with Type and Academic Rank, Control method by FTE, Hours, Days, or Pay; Position Status with control dates; Work Location; and Bargaining Unit. Position Control counts are system maintained to show Available, Filled, Acting, Reserved, Requisitioned, and Vacant FTE totals for the position. See PCDB, Function 10, Basic Position Information Screens (Update-002 and Inquiry-012).

- **Labor Distribution Information** - Screen to hold the accounting information for the position, such as; Fund, Object, Program, Location and Percentage. A position may be distributed to up to ten accounts. See PCDB, Function 10, Labor Distribution Information Screens (Update-003 and Inquiry-013).

- **Financial Information** - Screen to hold key financial information used to project the cost allocation for the position when it is vacant. The financial information includes: Pay Basis, Work Calendar, Percentage Full-Time, Salary Placement including Periodic Stipends, Retirement coverage, Benefit package eligibility, and Additional Contributions eligibility code. The system uses the financial information to calculate both monthly and annual budget allocations. See PCDB, Function 10, Basic Position Information Screens (Update-004 and Inquiry-014).

- **Position Skills Information** - Optional screen to hold information regarding the skills necessary to serve in the position, such as; Position Description, Skill Types, Education Level, and Special Qualifications. See PCDB, Function 10, Position Skills Information Screens (Update-005 and Inquiry-015).

- **Requisition Information** - Optional screen to hold information needed to process a requisition to use the position. Requisition information includes: requisition Date and Status, FTE or Dollar allocation for the requisition, requesting manager, person identified to fill the position with a start and end date for the assignment, and requisition comments. See PCDB, Function 10, Requisition Information Screens (Update-006 and Inquiry-016).
HRS POSITION CONTROL

Position Control Options

OVERVIEW

District Position Control Options

HRS Position Control provides a district with one of the following three options:

**District Option 1** -- elect not to use the HRS Position Control module. With this option, Position Control files are not established and HRS Position Control editing and reporting is not available to the district. The district can continue current HRS operation without a change.

**District Option 2** -- use the HRS Position Control module to monitor employee assignment activity. With this option, the system provides on-screen warning messages and audit reports comparing employee activity to the Position Control allocation. The system will call attention to situations where the allocation has been or will be exceeded. The Position Control Data Base [PCDB] file is established and Position Control information is maintained by the district.

**District Option 3** -- use the editing capabilities of the HRS Position Control module to monitor employee assignment activity and prevent active assignments from being entered if the assignment will exceed the Position Control FTE allocation. With this option, the system provides on-screen fatal messages when an assignment cannot be processed. Audit reports comparing employee activity to the Position Control allocations call attention to situations where the allocation has been or will be exceeded. The Position Control Data Base [PCDB] file is established and Position Control information is maintained by the district.

Districts using options two or three have access to Position Control reports.
HRS POSITION CONTROL

OVERVIEW  Position Control Processing

Processing On-Line Real-Time vs. Overnight Batch

On-Line Real-Time Processing

HRS allows users to add, change, and delete PCDB information using on-line real-time processing. This means the user can enter information on a screen and that information is immediately used by the computer to update the system. The user can immediately go back and see that the change has been posted to the system.

Overnight Batch Processing

The overnight batch process updates PCDB records based on that day's activity and automated procedures. The batch computer programs process activity that cannot be processed at the time districts are entering data on-line.

The results of the batch processes are reflected on the next workday's PCDB reports.

Overnight Batch Processing Examples

- Control Data Base (CDB) Salary Schedule Role recalculates the projected salary allocation for the position. See PCDB, Function 10, Financial Information Screen (004).

- Activation of new positions based on an Active Date. See PCDB, Function 10, Basic Position Information Screen (002).

- Closing positions based on a Close Date. See PCDB, Function 10, Basic Position Information Screen (002).

- Copy procedure to create the next fiscal year positions (June activity).

- Year-end roll process to move employee assignments from the current fiscal year positions to the positions allocated for the new fiscal year (July activity).

- Purging PCDB prior incumbent information during the year-end roll process.
Position Level vs. EDB assignment

On the EDB, each person may have from one to nine independent assignments or jobs. EDB editing and payroll processing requires that each job must have a different position number for an employee.

A position can be established on the PCDB with multiple FTE. This means more than one employee may be assigned to a position as long as the total count of FTE assignments does not exceed the maximum FTE allocation for the position.

EDB Changes that affect Position Control

When an employee is assigned to a position on EDB Job Assignment Screen (004), an immediate update occurs linking the EDB assignment to the PCDB position. As employees are terminated or moved to other position numbers, the PCDB will show a record that the employee is a prior incumbent of the position. Future dated EDB entries create position requisitions but are not considered an assignment for position status counting until they are implemented.

Position Control Changes that affect the EDB

Changes to Position Control Labor Distribution Screen (003) automatically update the EDB Labor Distribution Screen (006) for all employees assigned to the position unless the previous labor information was overridden. No update will occur if the labor information on EDB, Function 01, Labor Distribution Screen (006) has been manually overridden. See PCDB, Function 10, Labor Distribution Information Screen (003).

If a district selects Position Control Option 3, personnel will not be able to use a position number until the position is available. Position Control staff must build a position before it can be used. The availability of the position is controlled by the position status code and the FTE allocation entered on the Basic Position Information Screen (002). Increasing or decreasing the position allocation will affect the availability of FTE controlled positions. Activating or closing the position by changing the position status code will affect the ability of personnel to use the position. See PCDB, Function 10, Basic Position Information Screen (002).
HRS POSITION CONTROL

OVERVIEW

PC Effect on Other Areas

Relationship to Payroll

HRS Position Control does not establish any new payroll editing rules. An employee's pay will not be stopped because of a Position Control error condition. However, changes to account codes on PCDB, Function 10, Labor Distribution Information Screen (003) immediately update the EDB, Function 01, Labor Distribution Screen (006) for all assignments tied to the position. The next time the position is paid, the pay will be charged to the new account. The Labor Distribution for a position should not be changed until the prior-month pay has been processed to avoid charging the prior-month pay to the wrong account.

When a district elects to use Position Control Option 3, the personnel office will not be able to assign a new employee to the system until a sufficient FTE is available. The employee cannot be paid through HRS until an EDB record is established.

Position Control stores the fiscal year-to-date hours, days, and pay processed for each position. Payroll charges the hours, days, and amount of pay, processed for each employee to the Position Control file, under the position number being paid.

Relationship to Budget Module

Information maintained on Position Control screens 002, 003, and 004 will be passed to the HRS Budget module to assist in the budget preparation process. The values from the PCDB screens may be used to project salary and benefit costs when a position is vacant and does not have incumbents. In most cases where a position has current employees, the Budget Module will base its cost projections on incumbent information from the EDB.

Date Monitoring

The PCDB has two date-sensitive fields on the Basic Position Information Screen (002) that require monitoring. The Active Date controls the date when a position is activated so that personnel can make assignments to the position. The Close Date will close the position to new assignments. These dates directly effect the ability of personnel to use a position and must be monitored for the efficient operation of the system. Special reports can be provided to list positions that are scheduled to become active or to be closed.

PCDB Mass Change

HRS Position Control is supported by Mass Change. All data fields maintained on PCDB screens 002, 003, 004, 005, and 006, except position number and requisition number, may be updated through Mass Change. For information regarding Position Control Mass Changes, contact School Financial Services - Mass Changes via email at sfshrsops@lacoe.edu.
PCDB Year-End Transition

The HRS Position Control module supports position information for the current fiscal year and the next fiscal year. The system provides tools to facilitate the transition of position data, including incumbents, from one year to the next. See PCDB Processes - Creating Next Fiscal Year Positions, PC V-37.
Position Control Forms

HRS Position Control provides two system-generated forms to support district Position Control needs. The system automatically produces a form each time information effecting a position is entered on a Position Control screen. See detail pages PC VI-1 through VI-6.

- Position Profile Form
- Position Requisition Form

Position Control Reports

HRS Position Control provides both standard reports and special reports to meet district Position Control reporting needs. The system automatically produces selected standard reports while other reports are available to the district by special request. See detail pages PC VI - 7 through VI - 24.

System Generated Standard Reports

- Departmental Position Allocation List (POSR010) ..................Monthly
- Position Control Position List (POSR020) ..........................Monthly
- Position Change Register (POSR030) ..............................Daily
- Position Control Discrepancy Report (POSR060) ...............Biweekly
- Position Control Job Class List (POSR070) ............................Monthly
- Position Control Account List (POSR080) ..........................Monthly
- HRS Account Code Override List (POSR085) .......................Monthly

On Request Standard Reports

- Departmental Position Allocation List (POSR010)
- Position Control Position List (POSR020)
- Departmental Requisition List (POSR050)
- Position Control Job Class List (POSR070)
- Position Control Account List (POSR080)
- HRS Account Code Override List (POSR085)

On Request Special Reports

Districts using HRS Position Control need access to Position Control information in a wide variety of formats to meet specific needs. Standard reports do not always contain all information in a format that meets the district requirements. A district can request special Position Control reports specifically created to meet district needs. For information regarding Position Control Special Reports contact School Financial Services - Special Reports.
Using the Workstation

Districts using HRS Position Control should refer to the Beginning User section in the HRS Systems Operations Manual - Volume 1 for information regarding:

- Workstation
- Security and Selecting a Password
- Accessing the System
- HRS Message Board
- Selecting a Function and Sign-On
- Unsuccessful Sign-On
- Screen Abort / Malfunction
- Moving From Screen to Screen
- Removing Screen Data
- HRS Sign-Off
Position Control Security

HRS Position Control has screen level security control. Each employee the district authorizes to use Position Control is set-up with their own security profile specifying the screens they can use. When signing-on to HRS the employee enters a unique user ID and a password to validate the system access. This unique user ID and password is assigned when a security request has been submitted and processed. **Please do not share your security login information with anyone.** Security request forms are posted on our website at [www.lacoe.edu/hrs_security](http://www.lacoe.edu/hrs_security) or you can email the HRS Security and Operations Unit at sfshrsops@lacoe.edu.

Position Control Function menu 10 provides access to 6 update screens and 12 inquiry screens. District administration must supply School Financial Services - Security with the specific screens each district employee is authorized to use. Position Control reports are sent to the district through the LACOE mail service. It is the responsibility of the district to control access to reports.
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POSITION CONTROL DATABASE

CDB Information
LACOE staff will record the Position Control option selected by the district on District Profile Table Screen (020), Function 05.

Screen II-3 shows a district selecting Option 3 to use the full editing capability of the system and to print only one copy of each Position Profile Form and Position Requisition Form.

Field Descriptions

1 ^ POSITION CONTROL
   Position Control option selected by the district:
   1 - HRS Position Control Module not used.
   2 - Position Control Warning Messages.
   3 - Position Control Editing.

2 ^ POSITION CONTROL
   Number of Copies of Position Control Reports (maximum five copies).

3 ^ POSTN CNTRL REQ FLAG
   Position Control Requisition options selected by the district:
   N - No requisition processing
   O - Yes requisition but no paperwork
   1, 2, 3 - Yes requisitions, and the number of requisition copies to be produced

   Number of copies of position control requisition (maximum three copies). If blank, default to N.

^ = Required field
Function 11, District Codes Table Screen (028), Sub-Table "PC" is required to support the calculation of position costs on PCDB Function 10, Financial Information Screen (004). The table allows the development of a series of district-defined two-character "Benefit Package Codes" to identify district contributions for a position. Benefit Package Codes are required in the "Benefits Package" and the "Additional Contributions" fields on PCDB Financial Information Screen (004).

Table 28 Sub-Table "PC" is used to validate the Codes entered on screen 004. The table also provides the name of the package displayed on the screen and the monthly district contribution rates used to project the cost of the position.

*Screen II-4 shows nine package Codes that are samples of the types of packages used by districts. Package "CF" shows a title of "CSEA FT" on the PCDB Financial Information Screen (004) and uses a monthly rate of $561.80 for screen cost projections. Package "NA" is provided for positions that do not have district contributions to benefits.*
Field Descriptions

1 ^ CODE District defined two-character Code used on PCDB Financial Information Screen (004) to record Benefit Package and Additional Contribution Package.

2 ^ DESCRIPTION (PACKAGE NAME) Nine-character name used to describe the package on PCDB screen 004.

3 ^ ":" Enter ":" in the tenth position of the description field to separate the package name from the package monthly rate.

4 ^ DESCRIPTION (PACKAGE MONTHLY RATE ) Monthly package rate to show on PCDB screen 004. The rate can be up to $9999.99.

^ = Required field
** CTL - DISTRICT CODES TABLE - UPDATE **

<table>
<thead>
<tr>
<th>CODE</th>
<th>DESCRIPTION</th>
<th>CODE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>P00</td>
<td>010022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>R99</td>
<td>99000000</td>
<td>R00</td>
<td>00000000</td>
</tr>
<tr>
<td>R01</td>
<td>01000000</td>
<td>R02</td>
<td>02000009</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*(075) - LAST SCREEN - NO MORE DATA.*

`TRANS: 020 KEY 1: PN KEY 2: ___ KEY 3: ___ - DIST: 10011`

District Codes Table (28-Sub-Table "PN") records the last position number assigned and the last requisition number assigned for a fiscal year. The numbers are used to support the automatic numbering of positions and requisitions on PCDB screens 002 and 006. When either a new position or a new requisition is created the system will automatically add one to the number stored in the table for the appropriate fiscal year.

*Screen II-6 shows the last position and requisition numbers used. Number "010023" will be assigned to the next new position and "10" will be assigned to the next requisition for 2001-2002. When a new number is assigned the table is automatically updated.*

**Field Descriptions**

1. `^ CODE` A three-character alphanumeric Code used to identify the Fiscal Year of the requisition and position. The one-digit alpha Code:
   - P = Last position number established
   - R = Requisition number with the year

   With two-digit numeric Code:
   - = The last two digits of the year.
   (i.e. 2000-2001 = 01, 2001-2002 = 02)

2. `^ DESCRIPTION` Last position number and last requisition number assigned.

`^ = Required field`
POSITION CONTROL DATA BASE

Speed Key/Account Code Table (040)
The Speed Key/Account Code Linkup Table stores account (labor) distributions with percents which are used to facilitate data entry of account information on PCDB Labor Distribution Screen (003). Use of this table is optional.

There can be from 1 to 24 account (labor) distributions with varying percentages totaling 100 percent. The system validates each account in the financial system to the HRS account file. There is a two-day delay between when the account code is entered into the accounting system and when it will be validated in HRS.

**Additions, Changes or Deletions**

Districts maintain this table. Additions, changes, or deletions are input on-line, real-time, which means the entry is available for immediate use. Use Function 11, Control Table District Update.

*Note: Any update/change in the Speed Key/Account Code Linkup Table will not automatically update/change the related PCDB screen, 01/003, or the EDB screen, 01/006.*

- **Addition** - Enter the new Speed Key Code on the Speed Key/Account Code Linkup line or; on the bottom transaction line, enter TRANS “040” and for KEY 1, enter the Speed Key Code. Enter data in the blank fields using the field descriptions that follow.

- **Change** - Access the detail screen. Any field, except for the Speed Key, can be changed by overlaying or typing in the data.
Additions, Changes or Deletions (cont.)

- **Deletion** - Access the detail screen. Enter “D” in the Action Field when the message “ENTER YOUR CHANGES” appears, and TRANSMIT. When the message line asks for approval, enter an asterisk and TRANSMIT. Use caution when deleting Speed Keys, as it can impact EDB processing. For assistance, see the HELP Sheet in the front of the manual.

- **Copy** - Access the detail screen. Overlay or type in the new Speed Key Code in the Speed Key field and TRANSMIT. At the prompt, PLEASE REVIEW DATA ON SCREEN. OK TO PROCEED, enter “Y” to update the table.

Reports Generated

When additions, changes, or deletions are input, a Speed Key Table Report (AIMS040) in EDB is generated. See the Control Data Base Report Section for details on this report.

Field Descriptions

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>^</td>
<td>SPEED KEY</td>
</tr>
<tr>
<td>2</td>
<td>^</td>
<td>FUND</td>
</tr>
<tr>
<td>3</td>
<td>^</td>
<td>RESRCE/PROJYR</td>
</tr>
<tr>
<td>4</td>
<td>^</td>
<td>GOAL</td>
</tr>
<tr>
<td>5</td>
<td>^</td>
<td>FUNC</td>
</tr>
<tr>
<td>6</td>
<td>^</td>
<td>OBJ</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>^</td>
<td>SCH/LOC</td>
</tr>
<tr>
<td>8</td>
<td>^</td>
<td>PERCENT</td>
</tr>
<tr>
<td>9</td>
<td></td>
<td>SCREEN TOTAL</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>GRAND TOTAL</td>
</tr>
<tr>
<td>11</td>
<td></td>
<td>FISCAL YEAR</td>
</tr>
<tr>
<td></td>
<td>^</td>
<td>Required field</td>
</tr>
</tbody>
</table>

\[^ = Required field\]
The Table Search Screen lists all records and selected fields for each record. For information on how to access the search screen from the Function Menu or from a table detail screen, see the Control Data Base Introduction. To access a selected record detail screen from the search screen, see the description for field “1” below.

**Field Descriptions**

1. **Enter:**
   - X - access detail screen (all fields)
   - F - page forward one screen, if multiple screens
   - B - page back one screen, if multiple screens
   - T - go to the first record on the table
   - E - go to the last record on the table
   - M - jump to the Transaction Menu

2. Speed Key Code which is used as the sort key
POSITION CONTROL DATABASE

Menu Introduction
Position Control Menu Function 10 is the menu screen that displays the options available to support the Position Control function. The screen is divided into four areas:

- **Area 1** lists the update transactions that may be performed to support Position Control
- **Area 2** lists the inquiry transactions that are available
- **Area 3** shows the last position number assigned.
- **Area 4** shows the last requisition number assigned for both the current and the next fiscal year.

**Screen III-3 displays the Position Control Menu with a sample transaction to build a New Position for fiscal year 2001-2002.** Transaction code "001" is entered to build the position, the Fiscal Year "02" is indicated and the position number field is left empty for the system to assign the next available position number to the New Position. This transaction will create position "876355", as indicated on screen III-9.

**Required Screens/Data**

PCDB Basic Position Information Screen (002), Labor Distribution Information Screen (003), and Financial Information Screen (004) are required to establish a complete position on the PCDB. A position is physically created at the time the 002 screen is updated. The Labor Distribution Information on screen 003 and the Financial Information on screen 004 must be entered before the position can support PC Budgets. Screens 002, 003, and 004 have required information that must be entered before the system will allow the user to move forward and the screen to be updated. (See the field description section that follows each screen.)
Optional Screens/Data

PCDB Function 10 Financial Information Screen (004), Position Skills Information Screen (005), and Requisition Information Screen (006) are optional and not required to use the Position Control module. However, screen 004 is required to use PC Budget. If the district chooses to use optional screens 004 or 006, some of the data fields on the screens are required; screen 005 has no required data fields. (See the field description section that follows each screen.)

To Build a New Position

Gather all data required for input on the PCDB screens prior to entering a new position. The system automatically scrolls from screen 002 to 003 and from 003 to 004 to assist with building a new position. When screen 004 is complete, the system will return to the PCDB menu. It is recommended that the same staff person enters the data on all three screens to ensure that the position has been properly established. If district staff does not use screen 004 they can change the transaction number at the bottom of screen 003 to jump to the next activity.

Note: HRS Position Control supports maintaining positions for two fiscal years, the current year and the next fiscal year. The system will automatically assign the position to the current fiscal year unless the user enters the next fiscal year in the FISCAL YR field at the bottom of the menu screen.

To Access the Position Control Screens

Use Function 10, Position Control Update and Inquiry

Add a New Position

- Input "001" for the TRANS to build a position
- Leave the position number blank for HRS to assign the next available position number
- Change the Fiscal Year if the position is for "next" year only

The Basic Position Information Screen (002) will appear. Input the data on screen 002 according to the screen description section on the pages that follow. Input the "Y" as directed and transmit. **DO NOT** change the TRANS code on screen 002; the system will automatically page to screen 003 and then to screen 004. Enter the appropriate data and after screen 004 is completed the system will automatically return to the Position Control menu. The position is actually created in the computer when "Y" is transmitted for screen 002. Screen 003 and screen 004 must be entered to complete the position.

Change position information

- Input screen number of area to be changed; 002, 003, 004, or 005
- Input the position number
- Enter Fiscal Year if position is for "next" year only

The requested screen will appear. Enter your changes on the screen and transmit. Enter "Y" to accept the changes and press transmit again.
Inquiry Position Information

- Input screen number of area to be viewed; 012, 013, 014, 015, 018, 019, or 020
- Input the position number
- Enter Fiscal Year if position is for "next" year only

The requested inquiry screen will appear.

Name Search

- Enter name or part of a name
- Enter Transaction number; 097, 098, or 099

The requested Name Search screen will appear.

- Input screen number of area to be accessed; 002, 003, 004, 005, 012, 013, 014, 015, 018, 019, or 020 (Enter the Transaction field to the left of the name)

The requested update or inquiry screen will appear.

See "Name Search" Section PC III - 49
See "Requisition Processing" Section PC V- 29
See "Special Topics" Creating Next Fiscal Year Positions Section PC V - 35

Vacant Position Search

- Enter transaction 020

The Vacant Position Search Screen will appear.

Reports Generated

Adding a New Position or changing information on an existing position will generate a Position Profile Form and a Position Change Register POSR030. Automated processes such as Fiscal Year-End Copy and Roll processes that change status of a position will produce Position Profile Forms (reports) and Position Change Register, POSR030. (See "PCDB Printed Forms" Section PC VI-1 and "PCDB Reports" Section PC VI-7 for details on these reports.) Creating a requisition or changing information on an existing position requisition will generate a Position Requisition form. (See the PCDB Forms and Reports section for detail on the form.)
(Intentionally left blank)
POSITION CONTROL DATABASE

Basic Position Information (002)
(Intentionally left blank)
### Screen III-9 — Basic Position Information Screen (002)

<table>
<thead>
<tr>
<th>JOB CLASS</th>
<th>JOB TITLE</th>
<th>TYPE</th>
<th>RANK</th>
<th>METHOD</th>
<th>5 UNITS</th>
<th>6 DOLLARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>ADMIN AIDE</td>
<td></td>
<td></td>
<td></td>
<td>2.7500</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Position Status**

- **A**: Active
- **F**: Filled
- **C**: Closed
- **P**: Prev
- **N**: New
- **M**: Master

**Position Work Location**

- **POS**: 876355
- **CODE/SUB-SITE**: H7200
- **WORK LOCATION TITLE**: IBS ACCOUNTING

**Comments**

- FYTD HOURS: ________
- DAYS: ________
- PAY: $ ________

---

Basic Position Information Screen (002) is the main screen used to establish a position. Information entered on this screen identifies:

- Position Number
- Position Job Classification
- Method of Controlling the Position and the allocation (FTE / Hours / Days / Pay)
- Position Status
- Position Work Location
- FYTD Hours / Days / Pay from payroll processing

Screen 012 is the Inquiry version of the 002 screen.

**Screen III-9 shows an Administrative Aide position in IBS Accounting (Work Location H7200) with a Position Control number of 876355. The position has been established for 2.7500 FTE with a current Position Status "A" Active. The Active Date of 7/01/01 allowed personnel to start using the position on July 1, 2001. The position was established for the 2001-2002 Fiscal Year, and continues until closed.**

**Field Descriptions**

1. **^ JOB CLASS**
   - Code to identify the job classification of the position. The code must be from the CDB Job Class Table (004). The system generates Job Class Title.

^ = Required field

---

**PC III - 9**
2  JOB TYPE  System-generated from Job Class Table (004):

C = Certificated       M = Personnel Commission member
N = Classified        X = Non employee
U = Unclassified      S = Student
B = Board member

3  ACADEMIC RANK  System-generated from Job Class Table (004).
   Code identifies type of position for community college reporting:

1 = Professor        4 = Instructor
2 = Associate Professor  5 = Lecturer
3 = Assistant Professor

4  ^ CONTROL METHOD  Code identifies the method used to monitor the position allocation:

F = FTE (Full Time Equivalent Counting)
H = Hours Counting
P = Pay Counting
D = Days Counting

"Filled", "Vacant", and "Available" FTE counts (displayed under) Incumbent Statuses will not be available if Control Method "H", "D", or "P" is selected. However, these fields will be Filled if Control Method "F" is used.

FTE Counting:

Monthly EDB assignments use the "% Full-Time" field on EDB screen 005 to calculate the FTE Filled.

100% Full-Time  =  1.0 FTE

Hourly and Daily EDB assignments can also be monitored by "F". In that case the system uses work hours from "WORK HRS/DY" field on EDB screen 005 divided by the Standard Hours In A Day from the Job Class Table (004) to calculate the FTE Filled. Three (3) WORK HRS/DY (EDB screen 005) divided by six (6) Standard Hours In A Day (Job Class Table 004) equals .50 FTE.

Positions using Control Methods "H", "D", or "P" accumulate Hours, Days, and Pay as payrolls are processed for each EDB assignment linked to the position. The position is monitored by comparing the accumulated Hours, Days, and Pay to the control Units and Pay entered for the position on PCDB screen 002.

^ = Required field
5  ^  UNITS

Maximum allocation of FTE, Hours, or Days for the position:

The maximum allocation for positions controlled by FTE, Hours, and Days is 999.9999. The maximum allocation for Units may be zero for positions controlled by Hours and Days if the position allocation is not monitored. Units must be zero if the Control Method is "P" (Pay).

6  ^  DOLLARS

The maximum pay allocation for a position is $9,999,999.99. Dollars may be entered to optionally monitor "P" for (Pay), "H" (Hours), or "D" (Days) controlled positions.

7  ^  POSITION STATUS

Code identifies position is available for personnel assignments:

A = Active - Position is available for EDB use.
C = Closed - Position is closed and no longer available to personnel for assignment. A position with current incumbents cannot be closed. (See Status "S").
F = Frozen - Position is in the adopted budget but has been frozen to restrict EDB use.
H = Hold - A part-year position is in the adopted budget that has not been released for EDB use.
I = Inactive - Position was in prior year’s budget and still has incumbents, but is not included as a current year position. Position is not available to the EDB for new assignments.
S = Closing - Position has incumbents and is marked to be automatically closed when incumbents are removed.

See "Position Status" Section PC V-15.

8  ^  STATUS DATE

Date position is initially established or updated.

9  ACTIVE DATE

Position is automatically activated on this date if the Position Status is "H". The Position Status is changed to "A" and the Status Date is reset to equal the Active Date. The Position Active Date can be changed to a date prior to the date of the original Active Date, but not to a later date, if there are incumbents attached to the position. An Active Date is required if the position is active. See "Position Status" Section PC V-15.

^  =  Required field
### HRS POSITION CONTROL

**PCDB - Basic Position Information (002)**

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td><strong>CLOSE DATE</strong> Position is automatically closed on this date if the current Position Status is &quot;H&quot;, &quot;F&quot;, or &quot;A&quot;. The Position Status code is changed to &quot;C&quot; and the Status Date is reset to equal the Close Date. However, if the position has incumbents the Position Status code is set to &quot;S&quot; until the incumbents are terminated or transferred. <strong>Close Date is required if the position is closed</strong> &quot;C&quot;. The Close Date must be after the Active Date. See Special Topics &quot;Position Status&quot; Section PC V-15.</td>
</tr>
<tr>
<td>11</td>
<td><strong>PREV POSITIONS</strong> User-entered Previous Position number if this position has been renumbered. Incumbent and requisitions still under the old number will be linked to the current number. See Special Topics &quot;Renumbering Positions&quot; Section PC V-38.</td>
</tr>
<tr>
<td>12</td>
<td><strong>NEW POSITIONS</strong> User entered New Position number will document when a position has been renumbered (position should be closed). See Special Topics &quot;Renumbering Positions&quot; Section PC V-38.</td>
</tr>
<tr>
<td>13</td>
<td><strong>MASTER POSITION</strong> Master Position allows splitting positions for &quot;job sharing&quot; where the shared jobs are at separate locations. Multiple subsidiary positions may be linked to one Master Position by entering the word &quot;MASTER&quot; in the Master Position record and the position number of the Master Position in the Master Position field on the subsidiary positions.</td>
</tr>
<tr>
<td>14</td>
<td><strong>INCUMBENT STATUSES</strong> This section of the screen displays system-maintained FTE counts related to employees linked to this position by EDB assignments. The system maintains five counts for each position. FTE Counting Formula: Total position units allocated in field five (5) = AVAILABLE + FILLED + ACTING + RESERVED + ACTING/RESERVED. Also see &quot;Status Counting&quot; Section PC V-1. NOTE: When multiple EDB jobs are tied to one position, the FTE counting formula will not show which specific job is Filled or which job has an &quot;Acting&quot; incumbent. All jobs for a single position are combined in the status counts. A list of position incumbents is available on PCDB screen 019.</td>
</tr>
<tr>
<td>15</td>
<td><strong>AVAILABLE</strong> System-generated FTE count of jobs available for permanent assignments. A job without an incumbent: AVAILABLE = Empty Jobs AVAILABLE = Max FTE minus FILLED, RESERVED, ACTING, and ACTING / RESERVED Always zero for control methods &quot;H&quot;, &quot;D&quot;, and &quot;P&quot;.</td>
</tr>
</tbody>
</table>

^ = Required field
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>16 FILLED</td>
<td>System-generated FTE count of paid employees assigned to this position. The count excludes Acting employees and employees on unpaid leave. FILLED = Job with paid Incumbent (NOT Acting) Always zero for control methods &quot;H&quot;, &quot;D&quot;, and &quot;P&quot;.</td>
</tr>
<tr>
<td>17 ACTING</td>
<td>System-generated FTE count of Acting employees assigned to the position. An Acting employee has a Job Permanency Indicator code set to &quot;A&quot; on EDB screen 004. The FTE count will show under ACTING/RESERVED if the position also has an incumbent on leave. ACTING = Job with Acting Incumbent Always zero for control methods &quot;H&quot;, &quot;D&quot;, and &quot;P&quot;.</td>
</tr>
<tr>
<td>18 RESERVED</td>
<td>System-generated FTE count of jobs reserved while the regular incumbent is on unpaid leave (coded with an &quot;L&quot; in the Job Status field on EDB screen 004). The job can only be temporarily filled with an Acting employee until the incumbent returns. RESERVED = Job with Incumbent on Unpaid Leave Always zero for control methods &quot;H&quot;, &quot;D&quot;, and &quot;P&quot;.</td>
</tr>
<tr>
<td>19 ACT/RSV</td>
<td>System-generated FTE count of jobs reserved while the regular incumbent is on unpaid leave and the job is currently filled by an Acting employee serving as a temporary replacement. If two full-time people are assigned to a position and one is the regular incumbent who is on unpaid leave with an EDB Job Status code of &quot;L&quot; and the second employee is a temporary replacement that has a job permanency code of &quot;A&quot; on the EDB, then the ACTING / RESERVED count will show a 1.000 FTE. ACTING/RESERVED = Job with an incumbent on unpaid leave and an Acting incumbent. Always zero for control methods &quot;H&quot;, &quot;D&quot;, and &quot;P&quot;.</td>
</tr>
</tbody>
</table>

**VACANCY STATUS:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>20 REQUISITIONED</td>
<td>System-generated FTE count of open requisitions. See Position Control screen 006, Section PC III-34. REQUISITIONED = FTE count from screen 006 Always zero for control methods &quot;H&quot;, &quot;D&quot;, and &quot;P&quot;.</td>
</tr>
</tbody>
</table>

^ = Required field
**HRS POSITION CONTROL**

**PCDB - Basic Position Information (002)**

21 TOTAL
   VACANT

*System-generated* FTE count of all open jobs for the position.

VACANT = Empty Jobs (AVAILABLE)

+ Jobs with incumbents on Unpaid Leave (Reserved).
Always zero for control methods "H", "D", and "P".

22 ^ POS WORK LOC

Physical location where an employee assigned to the position will perform his/her duties. Work Location can be used to show both a location and a subsite. Work Location Codes must be in the CDB Work Location Table (011). The *system generates* the location title from the table.

23 REPORT GROUP

Optional six-character field provided to allow districts to enter their own codes to support analysis and reporting requirements.

24 ^ BARGAINING UNIT

Code identifying Bargaining Unit from CDB Districts Code Table (028) BU. This code is used for special analysis and reporting. If no entry, the field will default to the Bargaining Unit code identified in the Job Class Table (004) for the classification entered for this position.

25 COMMENTS

Any comment of up to 75 characters may be entered for the position.

26 FYTD HOURS*

Fiscal Year-To-Date Hours paid against the position.

27 DAYS*

Fiscal Year-To-Date Days paid against the position.

28 PAY*

Fiscal Year-To-Date Pay charged to the position.

* The FYTD position totals are calculated by accumulating the FYTD amounts stored in each incumbent and prior incumbent record that is listed on PCDB screen 019. The position totals can be adjusted by manually entering a new rate amount on PCDB screen 002. The system will store the calculated adjustment in a special "adjustment record" that will show on PCDB screen 019.

^ = Required field

**Reports Generated**

Changing position information will produce a Position Profile Form and a Position Change Register POSR030. See "PCDB Printed Forms" Section PC VI-1 and "PCDB Reports" Section PC VI-7.
POSITION CONTROL DATABASE

Labor Distribution Information (003)
(Intentionally left blank)
Screen III-17 — Labor Distribution Information Screen (003)

** PC - FINANCIAL INFORMATION - UPD **

SPEED KEY

<table>
<thead>
<tr>
<th></th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>FUND</td>
<td>83</td>
<td>0</td>
<td>11100</td>
<td>0</td>
<td>10400</td>
<td>0</td>
<td>00000</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
</tr>
</tbody>
</table>

EFFEC DATE: 05 15 01

(P02) - ENTER YOUR CHANGES.

TRANS: 003  POSITION NUMBER: 876355  FISCAL YEAR: 02  DISTRICT: 10011

Screen III-17 — Corresponding EDB Labor Distribution Information Screen (006)

** PC - LABOR DISTRIBUTION - UPD **

SPEED KEY

<table>
<thead>
<tr>
<th></th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>FUND</td>
<td>83</td>
<td>0</td>
<td>11100</td>
<td>0</td>
<td>10400</td>
<td>0</td>
<td>00000</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>7</td>
<td>8</td>
</tr>
</tbody>
</table>

EFFEC DATE: 09 01 01

(P02) - ENTER YOUR CHANGES.

TRANS: 006  EID YZ5220175  JOB 1  DISTRICT 10011
Position Control Labor Distribution Screen (003) is the screen used to enter the Labor Distribution Information for charging salary and benefits to the position. Each position must be charged to at least one account and may be split-funded up to 24 accounts. When a position number is entered on EDB Job Assignment Screen (004) the system will automatically complete the EDB Labor Distribution Screen (006) with the accounts entered on PCDB screen 003.

**Warning:** If an account is not entered on PCDB screen 003, EDB screen 006 will be set up. It will be charged to the blank error account if the job is paid. (See EDB screen 006) Labor Distribution Override in EDB Position Control Screen Processes Section PC IV-8.

The following information is entered on screen 003 for each account.

- Fund and Sub Fund
- Resource/Project Year
- Goal
- Function
- Object
- School/Location
- Percent

Screen 013 is the Inquiry version of the 003 screen.

For PBA districts the system validates each account to the PBA file from the previous day. An account cannot be entered into PBA and used in Position Control on the same day. There is a one-day delay before the account will be accepted on PCDB screen 003.

Accounts for next year's positions may be entered by entering the proper fiscal year at the bottom of the screen. PBA districts must have the next year accounts loaded in PBA.

*Screen III-17 shows a position charged 100% to five different accounts.*

*Screen III-17 also shows the corresponding EDB Labor Distribution Screen (006) for an employee with a job assigned to the position (876355). When an account code is changed on PCDB screen 003, the system will perform an immediate update of the EDB Labor Distribution data on EDB screen 006 for the incumbents of the position. However, no update will occur if the labor distribution data on the EDB screen has been manually overridden.*
Field Descriptions

The first account line of FUND / OBJECT / PROGRAM / LOCATION / PERCENT must be completed.

1  SPEED KEY     District-defined code. 10-character alphanumeric.
2  ^ FUND        2-digit fund and 1-digit sub fund code.
3  ^ RESRCE/ PROJYR 5-digit resource and 1-digit project year code.
4  ^ GOAL        5-digit goal code.
5  ^ FUNC        5-digit function code.
6  ^ OBJECT      4-digit object code. System edits based on Job Type - If Job Type for the position is certificated "C", the Object code must begin with "1". If Job Type is not "C" (all other codes), the Object code must begin with "2".
7  ^ SCH/LOC     7-digit school/location code.
8  ^ PERCENT     Percentage plus 3 decimal places.
9  ^ SCREEN TOTAL Percentage plus 3 decimal places. The total of all accounts on the screen.
10 ^ GRAND TOTAL Percentage plus 3 decimal places. The total of all accounts must equal 100 percent.
11 ^ EFFECTIVE DATE Date the labor account string becomes effective which is always the current date.

^  =  Required field

Reports Generated

Changing position information will produce a Position Profile Form and a Position Change Register POSR030. See "PCDB Printed Forms" Section PC VI-1 and "PCDB Reports" Section PC VI-7.
POSITION CONTROL DATABASE

Financial Information (004)
(Intentionally left blank)
Financial Information Screen (004) is a screen that records salary, retirement, and benefit contribution information for the position as if it was vacant. This information is used to project position costs on the screen and is passed to the HRS Budget Module to support budget calculations. Information entered on this screen includes:

- Budgeted salary placement
- STRS/PERS/OASDI/MEDI allocation
- District contribution for benefits

Screen 014 is the Inquiry version of the 004 screen.

For a district that converts to Position Control, screen 004 is established on the night of conversion. The screen 004 data reflects Incumbent Information. When a district builds a new position, screen 004 is an extension of screen 002 and 003, and must be completed as parts of the add position process.

After conversion, the Benefit Package Code must be in the CDB. Before making additions/changes/deletions to this screen the Benefit Package Codes must be developed in the CDB under Function 11, District Codes Table Screen (028), "PC", Position Control. See Section PC II-4.

Screen 004 needs to reflect information as if position is vacant.

*Screen III-23 shows a full-time position allocated to salary schedule "X", Range "529" and Step "05" for a total monthly salary of $2375. The position is allocated to retirement plan "P8" that has PERS, OASDI, and Medicare.*
Field Descriptions

1. **PAY BASIS**
   - Standard Pay Basis used to project cost of a vacant position.
   - **M** = Monthly
   - **H** = Hourly
   - **D** = Daily
   - **L** = Lump Sum

2. **PROJECT OPTION**
   - Code controls the type of projection calculation performed in PC Budget Module.
   - **P** = Project salaries and benefits for control method F (FTE) and benefits only for control method P (Pay) positions.
   - **F** = Project salaries and benefits for FTE positions only.
   - **N** = Never project salary and benefits.

3. **WORK CALENDAR**
   - Standard Work Calendar used to identify the months to project salary and benefit costs for a vacant position. Calendar verified against CDB Calendar Table 029 for the current fiscal year.

4. **PERCENT FULL-TIME**
   - Percentage of a full-time salary used to prorate salary rate of a Vacant Position when the Pay Basis is monthly.

5. **VACANT SALARY SCHED**
   - Salary Schedule used to project cost of a vacant position. Schedule, Range (Column), and Step is verified against CDB Salary Schedule Tables 024 (Column) and 025 (Range).

6. **VACANT SALARY RANGE**
   - Salary Range used to project cost of a vacant position. Schedule, Range (Column), and Step is verified against CDB Salary Tables 024 (Column) and 025 (Range).

7. **VACANT SALARY STEP**
   - Salary Step used to project cost of a vacant position. Schedule, Range (Column), and Step is verified against CDB Salary Tables 024 (Column) and 025 (Range).

8. **PRORATE CODE**
   - **F** = First month
   - **L** = Last month
   - **B** = Both (First and Last month)

9. **PRORATE %**
   - 01 to 99 percent to prorate monthly salary for the annual projection. Data fields "8" and "9" are used for annual projections.

10. **STEP INC MONTHS**
    - The number of months used to project when a Step increase should be budgeted for a vacant position. (“03” would go to next Step in March, "00" would be no Step increase projected).

^ = Required field
### HRS POSITION CONTROL

#### PCDB – Financial Information Screen (004)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>STIPENDS</td>
<td>Standard Periodic Stipends used to project the cost of a vacant position. The two-character Stipend plus the one-digit level code is validated against CDB Stipend Table 026. A position may have up to five Periodic Stipends.</td>
</tr>
</tbody>
</table>
| 12 | RETIRE PLAN | Standard plan that identifies eligibility for PERS, STRS, OASDI, and Medicare expenses that will be budgeted for a vacant position. Valid codes are:  
  - PERS = P1 through P9  
  - STRS = S1 through S5  
  - CERS = C1 through C5, C8 (LACOE only)  
  
  Refer to the section on Retirement Coding in the Systems Operations Manual - Volume 1 for information on the available plan codes. |
| 13 | BENEFIT PKG | Code identifies typical eligibility for district contributions to standard benefits such as medical, dental, and life coverage for vacant position. The benefit package code is validated against the CDB District Codes Table 028-PC with the package code. The rate used for the budget allocation is provided by the table. |
| 14 | BENEFIT MONTHS | Number of months used to project the annual cost allocation of benefit package (10 or 12) identified. |
| 15 | ADDL CONTRIB PKG | Code identifies typical eligibility for district contributions to any of the other types or benefits coverage for the vacant position. The additional contribution package code is validated against the CDB District Codes Table 028-PC with the package name, up to nine characters, and the rate used for the budget allocation provided by the table. |
| 16 | ADDL CONTRIB MONTHS | Number of months used to project the annual cost allocation of the additional contribution package (10 or 12). |

^ = Required field

### COST PROJECTIONS:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>VACANT MONTHLY</td>
<td>Projected monthly cost allocations for vacant position. Projection is based on information entered on this screen and reflects total number of FTE's vacant for the position.</td>
</tr>
</tbody>
</table>
| 18 | INCUMBENT MONTHLY | Total monthly costs of employees assigned to position.  
  
  NOTE: System can only total up to 30 incumbents. If more than 30 incumbents are found for a position the screen will display a warning message. |

^ = Required field
**19 INCUMBENT ACTUAL FYTD** Total fiscal year-to-date costs for incumbents of the position. This includes: Salary, Retirement, Benefit Package, and additional contribution.

**COST PROJECTIONS (continued):**

**20 SALARY**  
*System-generated* Projected salary allocation for the position  
Projection is based on information entered on this screen.

\[
\begin{align*}
\text{Monthly Non-Certificated (Classified)} &= (\text{Monthly Rate from SCHED/RANGE/STEP} + \text{Stipends}) \times \text{Percent Full-Time} \\
\text{Daily Non-Certificated (Classified)} &= (\text{Daily rate from SCHED/RANGE/STEP} + \text{Stipends}) \times \text{Standard Days From District Profile Table} \\
\text{Hourly Non-Certificated (Classified)} &= (\text{Hourly Rate from SCHED/RANGE/STEP} + \text{Stipends}) \times \text{Standard Hours from District Profile Table} \\
\text{Monthly Certificated} &= (\text{Monthly Rate from SCHED/RANGE/STEP} + \text{Stipends}) \times \text{Percent Full-Time} \\
\text{Daily Certificated} &= (\text{Daily Rate from SCHED/RANGE/STEP} + \text{Stipends}) \times \frac{\text{Days in work year from Work Calendar Table}}{(\text{Budget Months} / \text{Months from Work Calendar})} \\
\text{Hourly Certificated} &= (\text{Hourly Rate from SCHED/RANGE/STEP} + \text{Stipends}) \times \frac{\text{Hours in day from Job Class Table} \times \text{Days in work year from Work Calendar Table}}{(\text{Budget Months} / \text{Months from Work Calendar})}
\end{align*}
\]

The calculated monthly salary allocation can be manually overridden by typing a rate in the field. If the rate is manually entered an asterisk "*" will show to the right of the monthly rate.

\( ^{\wedge} \) = Required field
COST PROJECTIONS (continued):

21  RETIREMENT  *System-generated* Projected STRS/PERS allocation for position based on various plan rates times the monthly salary. The STRS/PERS calculated monthly allocation can be manually overridden by typing a rate in the field. If the rate is manually entered an asterisk "*" will show to the right of the monthly rate.

22  BENEFIT PACKAGE  *System-generated* Projected Benefit Package allocation for position based on rate obtained from the District Codes table 028, "PC" for the package code. The calculated monthly benefit package allocation can be up to $999,999.99 and may be manually overridden by typing a rate in the field. If the rate is manually entered an "*" will show to the right of the monthly rate.

23  ADDL CONTRIB  *System-generated* Projected monthly Additional Contribution allocation for position based on the rate from the District Codes table 028, "PC" for the package code. The calculated monthly additional contribution package allocation can be up to $999,999.99 and may be manually overridden by typing a rate in the field. If the rate is manually entered an "*" will show to the right of the monthly rate.

24  TOTAL  Total Vacant Monthly = sum of Vacant Salary, Retirement, Benefit Package, and Additional Contributions.

Total Incumbent Monthly = sum of Incumbent Salary, Retirement, Benefit Package, and Additional Contributions.

Total Incumbent Actual FYTD = sum of Incumbent, Actual FYTD, Salary, Retirement, Benefit Package, and Additional Contributions.

^  =  Required field

Reports Generated

Changing position information will produce a Position Profile Form and a Position Change Register POSR030. See "PCDB Printed Forms" Section PC VI-1 and "PCDB Reports" Section PC VI-7.
(Intentionally left blank)
POSITION CONTROL DATABASE

Position Skills Information (005)
Position Skills Information Screen (005) is an optional screen to record information about the basic skills an employee will need to serve in the position. Information entered on this screen includes:

- Position Description
- Position Skills
- Position minimum Education level
- Special Qualifications

Screen 015 is the Inquiry version of the 005 screen.

Screen III-30 shows Position Skills information for an Administrative Aide with a BA degree, accounting, and analytical experience requirements.
## Field Descriptions

<table>
<thead>
<tr>
<th></th>
<th>Position</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>POSITION DESCRIPTION</td>
<td>Optional 75-character field to enter a description of the position.</td>
</tr>
<tr>
<td>2</td>
<td>SKILL TYPES</td>
<td>Eight 7-character fields to enter district defined types of skills required to serve in the position. (TYPING, SPANISH, ...)</td>
</tr>
<tr>
<td>3</td>
<td>EDUCATION LEVEL</td>
<td>District defined two-character code to specify minimum Education Level required to serve in the position. (HS, BA, MA ...)</td>
</tr>
<tr>
<td>4</td>
<td>SPECIAL QUALIFICATION</td>
<td>Optional 75-character field to enter Special Qualifications for the position.</td>
</tr>
</tbody>
</table>

## Reports Generated

Changing position information will produce a Position Profile Form and a Position Change Register POSR030. See "PCDB Printed Forms" Section PC VI-1 and "PCDB Reports" Section PC VI-7.
POSITION CONTROL DATABASE

Requisition Information (006)
Position Requisition Screen (006) is an optional screen used to record and maintain information regarding a requisition against a position. Position requisitions are a tool to support the planning process of assigning employees to positions by providing notification that a position is to be filled. A requisition can be manually generated by a request from a unit manager to fill a position or the system will automatically create a requisition when personnel enters a future dated assignment for a position. A position may have more than one requisition. Information entered on this screen identifies:

- Position Number
- When the Requisition was filed, and is current status
- The FTE allocation for the Requisition
- Manager placing the Requisition
- Who is to fill the position and when they will start
- An end date and a status if the assignment is to be temporary

Screen 016 is the Inquiry version of the screen.

Screen III-34 shows an active Requisition filed on 9/14/01 for position 812345. The Requisition is for 1 FTE to work at IBS Administration. Rhoda Fisher is the manager responsible for the requisition. Jack Davis is expected to fill the position on a permanent basis starting 10/01/01. Mr. Davis has been notified to start work.
# Field Descriptions

1  **REQUISITION NUMBER**

*System-generated* unique number identifying the requisition. The number assigned to the requisition comes from the District Codes Table (028) Sub-Table "PN". Each requisition is unique, but a position may have more than one requisition.

2  ^ **REQUISITION DATE FILED**

Date the requisition was filed with the office.

3  ^ **REQUISITION STATUS**

Letter code indicating the status of a requisition.

A = Active - The district is actively attempting to fill the position.
C = Closed - The district is no longer attempting to fill the position.

4  ^ **FULL TIME EQUIVALENT**

FTE count for the requisition. Required for FTE controlled positions. The system will not allow the total FTE count for the position to exceed the FTE allocation on PCDB screen 002.

5  **DOLLAR CONTROL**

Dollar amount for the positions that are controlled by a dollar limit.

6  **WORK LOCATION CODE/SUB-SITE**

Physical location where the employee assigned to the position will perform their duties. Work Location can be used to show both a location and a Sub-Site. Codes and location title are from the CDB Work Location table (11).

7  **REQUISITION MANAGER NAME**

Name of the manager making the requisition.

8  **REQUISITION CONTACT EXT**

Telephone number and extension of the manager filing the requisition.

9  **REQUISITION REQUESTED NAME**

Name of person expected to fill the position.

10 **REQUESTED START DATE**

Date position is to be filled. The date must be on or after the position activation date on screen 002 and before the position close date.

11 **REQUESTED END DATE**

End date for a person planned to fill the position on a limited-term basis. If entered, the end date must be after the requested start date.

^ = Required field
### HRS POSITION CONTROL

#### PCDB - Requisition Information (006)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 ACTING/PERMANENT</td>
<td>Identify that the requisition is to fill the position on Acting &quot;A&quot; or Permanent &quot;P&quot; basis.</td>
</tr>
<tr>
<td>13 PERSONNEL REQUISITION COMMENTS</td>
<td>Enter any comment up to 75 characters regarding the requisition.</td>
</tr>
</tbody>
</table>

^ = Required field

**Reports Generated**

Changing requisition information will produce a Position Requisition Form. See "PCDB Printed Forms" Section PC VI-1.
POSITION CONTROL DATABASE

Incumbent Summary (019)
Incumbent Summary Screen (019) shows current and prior employees assigned to the position. Screen 019 is system-generated and inquiry only. The top right portion of the screen shows the control Method and the allocation entered on PCDB screen 002. The second line shows the total FYTD Hours, Days, Pay, and Dollars accumulated for the position. The incumbent records are listed alphabetically within the Incumbent Status codes. "A" Active incumbents appear first, unpaid incumbents show second as "R" Reserved, and paid incumbents list third as "F" Filling the position. "P" Prior Incumbents are listed last in a separate section. At the bottom of the prior incumbent list, a special "Adjustment Record" will show if the FYTD totals have been manually adjusted on PCDB screen 002.

Entering an "X" in the column to the left of the EID Number and pressing Transmit will display detailed EDB information about the assignment on the Incumbent Information Screen (018).

Screen III-38 shows four incumbents on position 876355. Betty Anderson is in the position Job "1" that works at location "H7200" with a Job Class 773000. The assignment has an Incumbent Status of "F" that indicates that the job is filled. She is assigned to the position with a FTE of .75. Richard Marx is also an incumbent and he is filling the job with a .50 FTE. Barbara Schuman once worked in the position and is listed under "Prior Incumbents" with an Incumbent Status of "P". Units/$ do not show because she is no longer on the position.
<table>
<thead>
<tr>
<th>Field Descriptions</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1</strong> METHOD</td>
<td>System-generated Control Method selected for the position on PCDB screen 002. FTE or HOURS or DAYS or PAY</td>
</tr>
<tr>
<td><strong>2</strong> UNITS or DOLLAR</td>
<td>System-generated Units or Dollar maximum Number/Amount entered on PCDB screen 002 for the position.</td>
</tr>
<tr>
<td><strong>3</strong> FYTD: HOURS / DAYS / PAY</td>
<td>System-generated Total Fiscal Year-To-Date Hours, Days, and Pay accumulated for the position. The Calculation is done by summing the individual incumbent Hours, Days and, Pay plus &quot;Adjustment&quot; Hours, Days or Pay that may have been manually entered on PCDB screen 002.</td>
</tr>
<tr>
<td><strong>4</strong> &quot;__&quot; (Trans)</td>
<td>Ease of Use Feature Enter &quot;X&quot; (where the cursor defaults) and transmit to access detail Incumbent Information Screen (018) for selected incumbent.</td>
</tr>
<tr>
<td><strong>5</strong> EID NUMBER</td>
<td>System-generated Employee Identification Number of the employee assigned to position, (from EDB screen 004).</td>
</tr>
<tr>
<td><strong>6</strong> JOB</td>
<td>System-generated number of the incumbent's job assigned to position, (from EDB screen 004).</td>
</tr>
<tr>
<td><strong>7</strong> INCUMBENT NAME</td>
<td>System-generated name of employee assigned to position, (from EDB screen 004).</td>
</tr>
<tr>
<td><strong>8</strong> WORK LOCATION</td>
<td>System-generated Work Location of incumbent's job assigned to Position, (from EDB screen 004).</td>
</tr>
<tr>
<td><strong>9</strong> JOB CLASS</td>
<td>System-generated incumbent’s Job Classification, (from EDB screen 004).</td>
</tr>
</tbody>
</table>
| **10** JOB ST | System-generated incumbent's Job Status  
A = Active  
P = Paid Leave  
L = Unpaid Leave  
T = Terminated (from EDB screen 004). |
**PCDB - Incumbent Summary (019)**

11  **INCUMBENT STAT**

*System-generated Incumbent* Status in the position; regulated by Job Status on EDB screen 004.

- **F** = Filled - Employee is either active or on paid leave. Employee is not serving in an "Acting" capacity.
- **A** = Acting - Incumbent is Acting when job permanency indicator on EDB screen 004 is an "A".
- **R** = Reserved - Incumbent is on unpaid leave.
- **P** = Prior - During the current fiscal year the Incumbent has been terminated from the position or the employee has been transferred to another position.

12  **INCUMBENT UNIT / $**

*System-generated FTE*, FYTD, HOURS, DAYS, or PAY for the incumbent. The Number/Amount displayed depends on the control method selected for the position.

- FTE comes from Percent Full-Time on EDB screen 005
- FYTD Hours/Day/Pay come from Payroll processing

13  **PRIOR INCUMBENTS**

Alphabetical list of prior incumbents of the position. Employees that were assigned to the position but have been terminated or transferred to new positions during the current fiscal year. Prior incumbent names are deleted from the Position Control records at the start of each fiscal year. Incumbent Status shows as "P".
POSITION CONTROL DATABASE

Incumbent Information (018)
Incumbent Information Screen (018) displays EDB information for an incumbent of the position. Screen 018 is inquiry only. This screen can be entered from the HRS Position Control Name Search screens, (097, 098, and 099) or by entering an "X" in the column to the left of the EID number on the Incumbent Summary Screen (019). The "F" Forward, "B" Back, "T" Top, and "E" End transactions allow you to move forward and backward in incumbent records in the same order as they are displayed on screen 019. The "R" Return transaction allows you to return directly to the Incumbent Summary screen 019.

** Screen III-42 shows a current incumbent of position 876355. Betty Anderson is "A" Active on the position job "1" which works at location "H7200" with a Job Class "773000". She is permanent in the job and has a monthly salary of $2,375.00 paid for 12 months.**

**Field Descriptions**

1. **EID / NAME**  
   System-generated  EID Number and Name of employees assigned to the position.

2. **INCUMBENT STATUS**  
   System-generated  Incumbent Status in the position, (from EDB Screen 004). See detail on PC III-39, INCUMBENT STAT.

3. **JOB**  
   System-generated  employee’s Job Number, assigned to the position. (from EDB screen 004.)
<table>
<thead>
<tr>
<th></th>
<th>BARGAINING UNIT</th>
<th>PAY BASIS</th>
<th>PAY MONTHS</th>
<th>WORK CALENDAR</th>
<th>PERCENT FULL TIME</th>
<th>JOB CLASS</th>
<th>JOB STS</th>
<th>STATUS DATE</th>
<th>JOB PERMANENCY</th>
<th>SALARY RATE</th>
<th>WORK LOCATION</th>
<th>WORK PHONE EXT</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td><em>System-generated employee’s</em> Bargaining Unit in the position, (from EDB screen 004.)</td>
<td><em>System-generated employee’s</em> Pay Basis in the position, (from EDB screen 005.)</td>
<td><em>System-generated</em> employee's Pay Months in the position, (from EDB screen 005.)</td>
<td><em>System-generated</em> employee's Work Calendar in the position, (from EDB screen 005)</td>
<td><em>System-generated</em> employee's Percent Full-Time in the position, (from EDB screen 005.)</td>
<td><em>System-generated employee’s</em> Job Classification in the position, (from EDB screen 004.)</td>
<td><em>System-generated employee’s</em> Job Status in the position, (from EDB screen 004.)</td>
<td><em>System-generated</em> employee's job Status Date in the position, (from EDB screen 004.)</td>
<td><em>System-generated</em> employee's Job Permanency in the assignment linked to the position, (from EDB screen 004.)</td>
<td><em>System-generated</em> employee's Salary Rate in the position, (from EDB screen 005.)</td>
<td><em>System-generated</em> Work Location of the employee's job assigned to the position, (from EDB screen 004.)</td>
<td><em>System-generated Work</em> Phone and extension of the employee's job assigned to the position, (from EDB screen 004.)</td>
</tr>
<tr>
<td>A = Active</td>
<td>P = Paid Leave</td>
<td>L = Unpaid Leave</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
(Intentionally left blank)
POSITION CONTROL DATABASE

Vacant Position Search (020)
The Vacant Position Search Screen provides a list of the current FTE controlled vacant positions. The screen can list all vacant positions for the district, 13 at a time. The search can be limited to a job classification code, a work location code, an account code or any combination of the three system access keys.

**Screen III-46 shows all the vacant FTE positions on file when the job class key, the work location key and the account code key have all been left blank**

NOTE: Closed positions will not be displayed.

**Field Descriptions**

1. **POSITION**  
   *System-generated* Position Number from PCDB Screen 002.

2. **STATUS**  
   *System-generated Position* Status (A = Available) from PCDB Screen 002.

3. **JOB CLASS TITLE**  
   *System-generated Job* Classification Code and Title from PCDB Screen 002.

4. **WORK LOCATION DESC**  
   *System-generated Work* Location Code and Description from PCDB Screen 002.

5. **VACANT AMOUNT**  
   *System-generated F.t.’s Vacant from PCDB Screen 002.*
### Screen III - 47.a — Vacant Position Search - Account Code Search

<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>POSITION JOB CLASS TITLE</th>
<th>WORK LOCATION DESC</th>
<th>VACANT</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>000013 83 0 11100 0 10400 00000 2111 3941000</td>
<td>225000 - ASST DIR SCH ACCT</td>
<td>N5300-SFS ACCTG/DSRMNT</td>
<td>1.0000</td>
<td></td>
</tr>
</tbody>
</table>

** PC - VACANT POSITION SEARCH **

** PC - VACANT POSITION SEARCH **

** PC - VACANT POSITION SEARCH **

** PC - VACANT POSITION SEARCH **

END OF DATA. PLEASE ENTER (B)ACKWARD, (T)OP OR (M)ENU

#### END OF DATA. PLEASE ENTER (B)ACKWARD, (T)OP OR (M)ENU

- TRANS: 020
- POSITION: ____
- FISCAL YR: 02
- RQSN: ______
- DISTRICT: 10011

### Screen III - 47.b — Vacant Position Search - Job Class & Work Location Search

<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>POSITION JOB CLASS TITLE</th>
<th>WORK LOCATION DESC</th>
<th>VACANT</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>000005 213000</td>
<td>213000 - ASST ADMIN IBS OPER</td>
<td>H7000-IBS ADMIN</td>
<td>1.0000</td>
<td></td>
</tr>
</tbody>
</table>

** PC - VACANT POSITION SEARCH **

** PC - VACANT POSITION SEARCH **

** PC - VACANT POSITION SEARCH **

** PC - VACANT POSITION SEARCH **

END OF DATA. PLEASE ENTER (B)ACKWARD, (T)OP OR (M)ENU

#### END OF DATA. PLEASE ENTER (B)ACKWARD, (T)OP OR (M)ENU

- TRANS: 020
- POSITION: ____
- FISCAL YR: 02
- RQSN: ______
- DISTRICT: 10011
### Screen III - 48.a — Vacant Position Search - Job Class Search

** PC - VACANT POSITION SEARCH **

<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>POSITION JOB CLASS TITLE</th>
<th>WORK LOCATION DESC</th>
<th>VACANT STATUS</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>010022 A 773000-ADMIN AIDE</td>
<td>H7200-IBS ACCOUNTING</td>
<td>1.0000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>888888 A 773000-ADMIN AIDE</td>
<td>J0000-HUMAN RESOURCES SVC</td>
<td>1.0000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

END OF DATA. PLEASE ENTER (B)ACKWARD, (T)OP OR (M)ENU

TRANS: 020  POSITION: _____  FISCAL YR: 02  RQSN: _____  DISTRICT: 10011

### Screen III - 48.b — Vacant Position Search - Work Location Search

** PC - VACANT POSITION SEARCH **

<table>
<thead>
<tr>
<th>ACCOUNT</th>
<th>POSITION JOB CLASS TITLE</th>
<th>WORK LOCATION DESC</th>
<th>VACANT STATUS</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>000013 A 225000-ASST DIR SCH ACCT</td>
<td>N5300-SFS ACCTG/DSPRMT</td>
<td>1.0000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

END OF DATA. PLEASE ENTER (B)ACKWARD, (T)OP OR (M)ENU

TRANS: 020  POSITION: _____  FISCAL YR: 02  RQSN: _____  DISTRICT: 10011
POSITION CONTROL DATABASE

Name Search

County Name Search (097)
District Name Search (098)
District Name Search (099)
The Name Search screens provide quick access to selected position data through the use of the name of an incumbent. If you know the name of a person you can easily find their position without going to the EDB or manual files. Name Search can also be used to find the current name for an employee with a name change.

The Position Control area has three Name Search Screens - (097), (098), (099):

- County Name Search (097) - Lists only the Primary Job
- District Name Search (098) - Lists all active job assignments
- District Name Search (099) - Lists all active and terminated assignments

Name Search screens are inquiry only. All data is pulled from the EDB.

**Accessing the Position Control Name Search Screens**

Use Position Control Function 10.

- On the Menu Screen under NAME, input the first initial of the last name, partial last name or full name. Full name is entered; last name, first name, (no space between last and first name).
- Under TRANS, input "097", "098" or "099".

**Screen Display Information for Prior Names**

If a prior name is entered for a name search, the system will display the current name on the screen. For example, on screen III-51, the prior name is Neal Patricia and the current name is Adams Patricia. The current name, Adams Patricia, displays on the Name Search screen when a name search is conducted for either names beginning with "NEA" or names beginning with "ADA". If the name search had been for the full name, Neal Patricia, the screen would display one name, Adams Patricia.

If you search with a single letter, "B", and the prior name begins with the same letter as the current name, the current name will list twice on the screen because you have two separate matches on the name file and you always see the current name for a match.

**Name search (Ease of Use Feature)**

When accessing Name Search Screens 097, 098, and 099 in Position Control Function 10, users can enter a transaction code to the left of the name to access Position Control screens 002, 003, 004, 005, 018, or 019.

PC III - 50
### Field Descriptions

1. **NAME KEY**
   - Displays the first initial of a last name, partial name, or full name.

2. **TRANS**
   - *Ease of Use Feature* Input, Position Control Transaction Code and transmit to access desired screen.

3. **PAY LOC**
   - *System-generated* Pay Location from EDB screens 003.

4. **EMPLOYEE TYPE**
   - *System-generated* from EDB screen 003.
   - B = Board Member
   - C = Certificated
   - N = Non-Certificated
   - M = Personnel Commission
   - S = Student
   - U = Unclassified
   - X = Non-employee

5. **EMPLOYEE STAT**
   - *System-generated* Employee Status from EDB screen 003.
   - A = Active
   - P = Paid Leave
   - L = Unpaid Leave
   - T = Terminated
   - F = Future Hire
   - N = Non-employee

6. **PRIMARY JOB**
   - *System-generated* from EDB screen 003.

7. **PRIMARY POSN**
   - *System-generated* Position Number for the Primary Job from EDB screen 004.
Screen III-52 — District Name Search Screen (098) - Active Assignments

Screen III-52 shows Peggy Robinson is on "L" Unpaid leave while the other employees are all "A" Active. Terminated employees do not show on this search.

Field Descriptions

1. **NAME KEY**
   Displays the first initial of last name, partial name, or full name.

2. **TRANS**
   *Ease of Use Feature* Input Position Control Transaction Code and transmit to access desired screen.

3. **POSITION**
   *System-generated* Position Number from EDB Screen 004.

4. **JOB TITLE**
   *System-generated* Job Title from EDB Screen 004.

5. **ST**
   *System-generated* Job Status from EDB Screen 004.
   
   - A = Active
   - N = Non-employee
   - P = Paid Leave
   - F = Future Hire
   - L = Unpaid Leave

6. **JOB**
   *System-generated* Job Number from EDB Screen 004. Each employee may have up to nine Jobs on the EDB.
**PC III-53 — District Name Search (099) - Active and Terminated Assignments**

<table>
<thead>
<tr>
<th>NAME KEY</th>
<th>NAME</th>
<th>EID</th>
<th>POSITION</th>
<th>JOB TITLE</th>
<th>ST</th>
<th>JOB</th>
</tr>
</thead>
<tbody>
<tr>
<td>R</td>
<td>RAVISE, CAROLYN</td>
<td>DE9958510</td>
<td>854321</td>
<td>BUDGET TECH</td>
<td>A</td>
<td>1</td>
</tr>
<tr>
<td>R</td>
<td>RELMAN, MARY</td>
<td>EH9995861</td>
<td>854321</td>
<td>BUDGET TECH</td>
<td>A</td>
<td>1</td>
</tr>
<tr>
<td>R</td>
<td>ROBINSON, PEGGY</td>
<td>YA9995854</td>
<td>826102</td>
<td>AUDITOR</td>
<td>L</td>
<td>1</td>
</tr>
<tr>
<td>R</td>
<td>ROCKEFELLER, MARTHA</td>
<td>BT4333888</td>
<td>730010</td>
<td>TEACHER</td>
<td>T</td>
<td>3</td>
</tr>
<tr>
<td>R</td>
<td>RUMFELD, KATHLEEN</td>
<td>CK9995815</td>
<td>826102</td>
<td>AUDITOR</td>
<td>A</td>
<td>1</td>
</tr>
</tbody>
</table>

*(075) - LAST SCREEN - NO MORE DATA.*

**PC - DISTRICT NAME SEARCH ** 1099

Screen III-53 shows the same information as the Name Search Screen (098) PC III-52 with the addition of a Terminated "T" employee, Martha Rockefeller.

**Field Descriptions**

1. **NAME KEY**
   - Displays the first initial of last name, partial name, or full name.

2. **TRANS**
   - *Ease of Use Feature* Input Position Control Transaction Code and transmit to access desired screen.

3. **POSITION**
   - *System-generated* Position Number from EDB Screen 004.

4. **JOB TITLE**
   - *System-generated* Job Title from EDB Screen 004.

5. **ST**
   - *System-generated* Job Status from EDB Screen 004.
     - A = Active
     - N = Non-employee
     - P = Paid Leave
     - F = Future Hire
     - L = Unpaid Leave

6. **JOB**
   - *System-generated* Job Number from EDB Screen 004. Each employee may have up to nine Jobs on the EDB.
(Intentionally left blank)
POSITION CONTROL DATABASE

EDB Position Control Screen Processes
(Intentionally left blank)
The physical link between the EDB job assignment and the PCDB position is established when EDB screen 004 is updated with the "Y". The name, job number and EID number of employee are stored in PCDB under position incumbent information and can be immediately viewed on PCDB screens 019 and 018. FTE is automatically updated when EDB screen 004 is completed or changed.

Districts using the Position Control Module may see either Position Control warning messages or Position Control fatal error message on EDB screens 004 and 005. The messages are the results of finding discrepancies when the employee assignment information entered on EDB screens 004 and 005 is compared to the position information stored on PCDB screen 002.

Districts that select Position Control Module Option "2" will receive warning messages on EDB screens 004 and 005 when Personnel attempts to process an assignment to a position number that is not available. Positions with an FTE allocation will have a warning message appear if a new assignment will cause the FTE to exceed the allocation. Option "2" districts may enter a special override code to allow the EDB screen to accept the invalid information. The invalid information will cause a warning message to show on the Position Control Discrepancy Report (POSR060) until the condition is corrected.

Districts that select Position Control Module option "3" will see fatal error message on EDB screens 004 and 005 when a new assignment causes the FTE to exceed the allocation. The system will not accept invalid information. The screen must be corrected before the system will allow the screen to be updated.

Districts that choose not to use Position Control will have Position Control Option set to "1" on District Profile Table (020). Position Control information will not be validated and Position Control messages will not appear on EDB screens and reports.
HRS POSITION CONTROL

EDB - Position Control Screen Processes

Option "2" Districts

EDB screen 004 Warning Messages

When Personnel attempts to assign an employee to a position and the position is not available, one of the following warning messages is displayed on EDB screen 004. The position number will be accepted if an "O" is entered to override the error condition.

- WARNING. POSN # NOT ON PCDB. ENTER "O" FOR OVERRIDE (invalid position #)
- WARNING. POSN HELD. ENTER "O" FOR OVERRIDE (position status "H")
- WARNING. POSN FROZEN. ENTER "O" FOR OVERRIDE (position status "F")
- WARNING. POSN INACTIVE. ENTER "O" FOR OVERRIDE (position status "I")
- WARNING. POSN CLOSING. ENTER "O" FOR OVERRIDE (position status "S")
- WARNING. POSN CLOSED. ENTER "O" FOR OVERRIDE (position status "C")
- WARNING. POSN EXCEEDS FTE LIMIT. ENTER "O" FOR OVERRIDE

Screen IV-4 shows an attempt to assign Bob Lomont to position number "078901". The message "WARNING. POSN # NOT ON PCDB ENTER "O" FOR OVERRIDE", is displayed because the position has not been created by Position Control. The update will be accepted if an "O" is entered in the action field and the transmit key is pressed.

Screen IV-4 — Option "2" - EDB screen 004 Warning Message

When an override transaction is posted on EDB screen 004, a warning message will show on the Position Control Discrepancy Report (POSR060) until the condition is corrected.
Option "2" Districts

EDB screen 005 Warning Message

When Personnel attempts to enter a percentage full-time assignment that will cause the FTE to exceed the allocation for a position controlled by FTE, the following warning message is displayed on EDB screen 005. The information will be accepted if an "O" is entered to override the error condition.

- WARNING. POSITION EXCEEDS FTE LIMIT. ENTER "O" FOR OVERRIDE

Screen IV-5 shows an attempt to increase the percentage full-time for Bob Lomont in position number "000001". The message "WARNING. POSITION EXCEEDS FTE LIMIT. ENTER "O" FOR OVERRIDE", is displayed because the percent full-time entered on the screen will exceed the FTE allocation for the position. The update will be accepted if an "O" is entered in the action field and the transmit key is pressed.

Screen IV-5 — Option "2" - EDB screen 005 Warning Message

When an override transaction is posted on EDB screen 005, a warning message will show on the Position Control Discrepancy Report (POSR060) until the condition is corrected.
HRS POSITION CONTROL

EDB - Position Control Screen Processes

Option "3" - DISTRICTS

EDB screen 004 Fatal Error Messages

When Personnel attempts to assign an employee to a position and the position is not available, a fatal error message is displayed on EDB screen 004. Personnel will not be able to complete the transaction with the position number entered on the screen. Fatal error messages are:

- POSITION NUMBER NOT ON PCDB. IT MUST BE CORRECTED (invalid position #)
- POSITION HELD. NOT FOR CURRENT USE (position status "H")
- POSITION FROZEN (position status "F")
- POSITION INACTIVE (position status "I")
- POSITION CLOSING (position status "S")
- POSITION CLOSED (position status "C")
- POSITION EXCEEDS FTE LIMITS

Screen IV-6 shows an attempt to assign Kathleen Schultz to position number "876359". The message "POSITION CLOSED" is displayed because the position status code on PCDB screen 002 is "C" for closed. The assignment cannot be completed with the current position number. If a valid position is not entered, the user must leave EDB screen 004 without updating.

Screen IV-6 — Option "3" - EDB screen 004 Fatal Error
Option "3" - DISTRICTS

EDB screen 005 Fatal Error Message

When Personnel attempts to enter a percentage full-time that will cause the FTE to exceed the allocation for a position controlled by FTE, the following fatal error message is displayed on EDB screen 005. The percentage full-time must be reduced to a level within the FTE allocation before the system will accept the update.

- POSITION EXCEEDS FTE LIMIT

Screen IV-7 shows an attempt to enter 100% in percentage full-time for Mary Helman in position number "854321". The message “Position Exceeds FTE Limit” is displayed because 100% will try to add 1.000 FTE to the existing allocation for the position and the calculated total FTE will exceed the authorized total FTE for the position. The user will not be able to enter the 100%.

Screen IV-7 — Option "3" - EDB screen 005 Fatal Error

```
** PER - SALARY/PAY RATE - UPD **
CH3335861 HELMAN,MARY EFFEC DATE: 07 01 01 ACTNS: 20
1 854321 315000 BUDGET TECH
TIME TIME
E4 M 12 NA NA 103 T REG OVT-H - -
SCHED/RANGE/STEP EFF DATE %FULL-TIME CALC METH FULL-TIME RATE SALARY RATE
L 015 05 07 01 01 100.00 3070.000 3070.000
STIPENDS: --- --- --- --- --- --- --- --- --- ---
--- --- --- --- --- --- --- --- --- ---
--- --- --- --- --- --- --- --- --- ---
RETIRE RATE O/RIDE WORK DAYS WORK CAL WORK HRS/DY SESS TYPE
3070.000 260.0 A 4.00 S
RETIREMENT: PLAN STATUS SPL EFF DATE PERS CASE STS CLS CD BASE HRS
P8 M 08 01 01 STRS STRS
(731) - POSITION EXCEEDS FTE LIMIT.
TRANS: 004 EID: CH3335861 JOB: 1 DISTRICT: 30033
```
EDB screen 006 - Labor Distribution Override

Districts using HRS Position Control will enter the position Labor Distribution information on PCDB screen 003. The system will automatically update the Labor Distribution information on EDB screen 006 for employees assigned to the position unless a labor account is manually entered on screen 006. The message "*** - POSITION CONTROL DISTRIBUTION IS OVERRIDDEN - ***" will show that a Labor Distribution account has been manually entered on EDB screen 006.

When a Labor Distribution has a manual override on EDB screen 006, labor account changes on PCDB screen 003 will not be posted to the EDB screen. If the manual override account on EDB screen 006 is removed by spacing out the old account information, using an appropriate action code (18), the system will automatically enter the account from PCDB screen 003.

Screen IV-8 shows the labor account on EDB screen 006 for Faye Ewing is an overridden account.

Screen IV-8 — EDB screen 006 - Labor Distribution Override

```
** PER - LABOR DISTRIBUTION - UPD **

TG99995833  EWING,FAYE    EFFEC DATE: 10 29 01    ACTNS: 18    Primary JOB: 1
JOB: 1    POSITION: 854321    JOB CLASS: 315000    BUDGET TECH
FISCAL YEAR: 02
SALARY RATE: 2758.000
FULL-TIME RATE: 2758.000

SPEED KEY
1 01 0 11300 0 18010 00000 2410 0000000 00000 00000
2
3
4
5
6
7
8
9
10
11
12

*** POSITION CONTROL DISTRIBUTION IS OVERRIDEN ***

(005) - UPDATE FROM PREVIOUS SCREEN SUCCESSFUL.
TRANS 006  EID TG99995833  JOB 1  DISTRICT 10011
```
EDB screen 006 - Missing PCDB Labor Distribution

Districts using HRS Position Control will enter the position Labor Distribution information on PCDB screen 003. The system will automatically update the Labor Distribution information on EDB screen 006 for employees assigned to the position. If the Labor Distribution information has not been entered on PCDB screen 003, the PCDB position record will be incomplete and the EDB screen 006 will show an error account distribution of all "9's". Personnel should notify Position Control and when the correct Labor Distribution is entered on PCDB screen 003, the system will automatically correct the EDB account.

The screen IV-9 below, shows EDB screen 006 for Faye Ewing on position "854321". The labor account shows all "9's" because the labor account information for the position has not been entered on PCDB screen 003. When a valid account is entered on PCDB screen 003, EDB screen 006 will be automatically updated to show the correct account number.

IV-9 — EDB screen 006 - Missing PCDB Labor Distribution
POSITION CONTROL DATABASE

Status Counting
(Intentionally left blank)
Incumbent Status

The Position Control Incumbent Status FTE counts provide information regarding assignments to a position and the FTE available to hire additional staff. If the incumbent of a position has a Job Permanency code of "A" for acting, the PCDB Position Control Incumbent Status will be "A" to indicate the person assigned to the position is "Acting". If an incumbent of a position is placed on unpaid leave, EDB Job Status "L", the Position Control Incumbent Status for the position will be "R" for reserved meaning only a "Acting" assignment may be made to the position. Acting assignments may be made to temporarily fill a position while the regular employee is on unpaid leave or to temporarily fill an "empty" (vacant) position until a regular employee is available. All other incumbents are considered to be filling a position with the Position Control area showing an Incumbent Status of "F". The FTE of the incumbents will be counted in the "Filled" status on Position screen 002. See "Incumbent Statuses" under Basic Position Information Screen (002), description on PC III - 12.

Vacancy Status

Positions with a control method of "F" for FTE will show a vacancy if an employee can be assigned to the position without exceeding the FTE allocation. An employee can be assigned to a position under two conditions: the job is empty and counted as "A" Available; or the job is "R" Reserved where the position can have a temporary replacement while the regular incumbent is on unpaid leave. The Total Vacant count equals the Available FTE (empty jobs) plus the Reserved FTE (incumbents on unpaid leave). Positions with a control method of "H" Hours, "D" Days, or "P" Pay will not show as vacant because an unlimited number of employees may be assigned to the position. In this case Position Control is not concerned with the number of employees hired but monitors the Hours, Days, and Pay the incumbents receive. See "Total Vacant" under Basic Position Information Screen (002), description on PC III - 13.
Filled

Screen V-4 shows position "854321" with a multiple FTE allocation of 3.000. The position currently has 1.500 FTE incumbents assigned to the position showing as Filled under Incumbent Statuses. Screens V-5.a and V-5.b show examples of EDB salary screens 005 for the employees assigned to the position. Screen V-5.a shows Carolyn Davis is assigned 100% to the position and is counted as 1.000 FTE. Screen V-5.b shows Mary Relman is assigned 50% to the position and is counted as 0.500 FTE. Together they "fill" the position with 1.500 FTE.

Available

Screen V-4 shows 1.500 FTE Available for the position. FTE Available is calculated by the system subtracting the 1.500 currently Filled from the 3.000 FTE position allocation.

Note: Positions with a control method of "H" Hours, "D" Days, or "P" Pay will show ZERO available positions.

Total Vacant

Screen V-4 shows a Total Vacant count of 1.500 FTE. The Total Vacant count is calculated by the system adding the Available 1.500 FTE to the Reserved 0.000 FTE count. NOTE: Positions with a control method of "H" Hours, "D" Days, or "P" Pay will show ZERO vacant positions.
### Screen V-5.a — EDB screen 005 - Filled Position - 1.000 FTE

<table>
<thead>
<tr>
<th>EID</th>
<th>CH9995851</th>
<th><strong>PER - SALARY/PAY RATE - UPD</strong></th>
<th>0405</th>
<th>EFFEC DATE: 07 01 01 ACTNS: 20</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOB</td>
<td>1</td>
<td>JOB POSITION JOB CLASS</td>
<td></td>
<td>PRIME JOB: P</td>
</tr>
<tr>
<td>1</td>
<td>854321</td>
<td>315000 BUDGET TECH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CYCLE TIME</td>
<td>E4 M 12 NA NA 103 T</td>
<td>TIME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BASIS PAY MOS ILL PLAN VAC PLAN RPT LOCN RPT CD EARNINGS TYPES</td>
<td>E4 M 12 NA NA 103 T</td>
<td>TIME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SCHED/RANGE/STEP EFF DATE %FULL-TIME CALC METH FULL-TIME RATE SALARY RATE</td>
<td>L 015 05 08 01 01 100.00</td>
<td>2979.900 2979.900</td>
<td>100.00</td>
<td></td>
</tr>
<tr>
<td>STIPENDS:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RETIRE RATE</td>
<td>O/RIDE WORK DAYS WORK CAL WORK HRS/DY SESS TYPE</td>
<td>2979.900 260.0 A 8.00 S</td>
<td>50.00</td>
<td></td>
</tr>
<tr>
<td>RETIREMENT: PLAN STATUS SPL EFF DATE PERS CASE STS CLS CD BASE HRS</td>
<td>P8 M 08 01 01</td>
<td>10011</td>
<td>00</td>
<td></td>
</tr>
</tbody>
</table>

(073) - ENTER ACTION OR TRANSACTION DATA TO PROCEED.
TRANS: 004 EID: CH9995851 JOB: 1 DISTRICT: 10011

### Screen V-5.b — EDB screen 005 - Filled Position - 0.500 FTE

<table>
<thead>
<tr>
<th>EID</th>
<th>EH9995861</th>
<th><strong>PER - SALARY/PAY RATE - UPD</strong></th>
<th>0405</th>
<th>EFFEC DATE: 07 01 01 ACTNS: 20</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOB</td>
<td>1</td>
<td>JOB POSITION JOB CLASS</td>
<td></td>
<td>PRIME JOB: P</td>
</tr>
<tr>
<td>1</td>
<td>854321</td>
<td>315000 BUDGET TECH</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CYCLE TIME</td>
<td>E4 M 12 NA NA 103 T</td>
<td>TIME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BASIS PAY MOS ILL PLAN VAC PLAN RPT LOCN RPT CD EARNINGS TYPES</td>
<td>E4 M 12 NA NA 103 T</td>
<td>TIME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SCHED/RANGE/STEP EFF DATE %FULL-TIME CALC METH FULL-TIME RATE SALARY RATE</td>
<td>L 015 05 08 01 01 50.00</td>
<td>3316.950 1658.475</td>
<td>50.00</td>
<td></td>
</tr>
<tr>
<td>STIPENDS:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RETIRE RATE</td>
<td>O/RIDE WORK DAYS WORK CAL WORK HRS/DY SESS TYPE</td>
<td>3316.950 260.0 A 4.00 S</td>
<td>50.00</td>
<td></td>
</tr>
<tr>
<td>RETIREMENT: PLAN STATUS SPL EFF DATE PERS CASE STS CLS CD BASE HRS</td>
<td>P8 M 08 01 01</td>
<td>10011</td>
<td>00</td>
<td></td>
</tr>
</tbody>
</table>

(073) - ENTER ACTION OR TRANSACTION DATA TO PROCEED.
TRANS: 004 EID: EH9995861 JOB: 1 DISTRICT: 10011
Screen V-6.a — PCDB screen 006 - Requisition - 0.500 FTE

Screen V-6.a shows 0.500 FTE requisitioned. The requisition example, requisition number "02000008", is active for 0.500 FTE. The Requisitioned counts showing on screen 002, (screen V-6.b) is the total of all requisitions for the position. The total requisitioned for position "854321" equals 0.500 FTE because screen V-6.b has only one requisition.

Screen V-6.b — PCDB screen 002 – Vacancy Requisitioned - 0.500 FTE
Screen V-7 shows a terminated assignment that had been active on the screen V-4 position "854321". The terminated assignment shows on screen 019 as a "prior incumbent" but the job is not included in any of the status counts displayed on PCDB screen 002. A termination will create a vacancy and will be displayed under Incumbents status "Available" and "Total Vacant" as displayed on PCDB screen 002.
An Acting assignment is created when the Job Permanency code on EDB screen 004 is coded with an "A" indicating that the employee has an acting status in this job. The employee assigned to the position is not expected to stay in the job and is considered temporary. The FTE count on Screen 002 is displayed under Acting.

V-8—EDB screen 004-Acting Assignment "A" (EDB screen 005 is 0.900 % Full-Time)

Screen V-8 shows Kathleen Rumfeld assigned to position "826102" with a Job Permanency code of "A" on EDB screen 004. On EDB screen 005 (not displayed) she is assigned with a percentage full-time at 0.900.
Screen V-9 — PCDB screen 002 - Acting Count

** PC - BASIC POSITION INFORMATION **

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POSITION STATUS ACTIVE CLOSE PREV NEW MASTER
A 07 01 01 07 01 01 ______ ______

< - - - - - - - INCUMBENT STATUSES - - - - - - - > < - - VACANCY STATUSES - - >
AVAILABLE FILLED ACTING RESERVED ACT/RSV REQUISITIONED TOTAL VACANT
1.1000 2.0000 0.9000 0.0000 0.0000 0.00 1.1000

POS WORK LOC POSITION REPORT GROUP BARGAINING
CODE/SUB-SITE WORK LOCATION TITLE UNIT
H7000 ___ IBS ADMIN ___ MM

COMMENTS FYTD HOURS: ____ DAYS: ____ PAY: $ ______

(002) - ENTER YOUR CHANGES.

TRANS: 002 POSITION NUMBER: 826102 FISCAL YEAR: 02 DISTRICT: 10011

Screen V-9 shows the PCDB screen 002 for position "826102" and reflects the 0.900 acting assignment under the Acting count as 0.900 FTE. The 1.100 Available FTE is calculated by the system subtracting the 0.900 FTE Acting (and the 2.00 FTE Filled) from the Position FTE count of 4.00. The Total Vacant count is calculated by adding the 1.100 FTE Available to the 0.000 FTE Reserved. If the sample position had an incumbent on unpaid leave the FTE count would show under Reserved and the Total Vacant count would be 0.10. (See Status Count - Acting / Reserved).
A reserved status is created when an incumbent of a position is placed on unpaid leave. When personnel enters a Job Status "L" for unpaid leave on EDB screen 004 the percentage full-time from EDB screen 005 is used to calculate the FTE created under the Reserved count on PCDB screen 002. A temporary replacement may be assigned to the position because the incumbent is not currently working.

The status count will show under Acting / Reserved if an Acting employee is assigned to replace the employee on leave. (See Status Count - Acting / Reserved).

Screen V-10 — EDB screen 004 - Unpaid Leave

Screen V-10 shows Peggy Robinson assigned to position "826102" and on an unpaid leave from 10/01/01 to 12/31/01 on EDB screen 004. On EDB screen 005 (not displayed) she is assigned with a percentage full-time at 100.00.
Screen V-11 shows the Reserved count of 1.000 FTE for position "826102" on PCDB screen 002.

Note: The Available FTE is 1.100. The system does not count Reserved FTE as Available for permanent replacements. The Total Vacant count is calculated by adding the 1.100 FTE Available to the 1.000 FTE Reserved.
HRS POSITION CONTROL

Acting/Reserved Unpaid Leave

A reserved status is created on PCDB when personnel enters a Job Status "L" for unpaid leave on EDB screen 004. The employee assigned to the position is not currently working and a temporary replacement may be assigned.

Screen V-12 — EDB screen 004 - Reserved On Unpaid Leave

---

Screen V-12 shows Faye Ewing assigned to position "826102" and on an unpaid leave from 11/01/01 to 2/15/02. She is assigned with a percentage full-time of 100.00.

*Note: The following job statuses on EDB screen 01 / 004 are counted on PCDB screen 10 / 002:

- A = ACTIVE (counted as filled)
- P = PAID LEAVE (counted as filled)
- L = UNPAID LEAVE (counted as reserved)
- T = TERMINATED (counted as vacant)
- F = FUTURE (Does not count)
An Acting assignment is created when the Job Permanency code on EDB screen 004 is coded as "A" for acting. The employee assigned to the position is not expected to stay in the job and is considered temporary.

Screen V-13 — EDB screen 004 Acting

Screen V-13 shows Irene Fox assigned to position "826102" with a Job Permanency code of "A" for acting, against Faye Ewing who is on Unpaid Leave on EDB screen 005 (not displayed). She is assigned with a percentage full-time of 100.00.
If an Acting replacement is assigned to a position with the incumbent on unpaid leave, the FTE count on screen 002 is displayed under Acting / Reserved.

Note: The Available FTE is 1.1000 and the Vacant FTE is 1.1000; the system does not count Acting/Reserved FTE as either Available or Vacant.

Screen V-14 — PCDB screen 002 Acting / Reserved Count

Screen V-14 shows the PCDB screen 002 for position "826102" with a FTE count of 1.000 under Acting/Reserved.
POSITION CONTROL DATABASE

Position Status
Using Position Status

The Position Status code on PCDB screen 002 determines the availability of the position for personnel assignments. When a position is entered, it can be established with a Position Status of "H" for hold or "F" for frozen. An error message will show on EDB screen 004 if an attempt is made to assign an employee to the position. The Position Status code must be set to "A" for Active before it can be used for assignments.

A position can be activated at any time by changing the status code to "A" and entering today's date or a past date in the Active Date. The user can have the system activate the position on a specified date by leaving the Position Status code at "H" and entering a future active date. When the date is reached the system will activate the position by changing the Position Status to "A" and copying the Active Date to the Status Date. A position with a Position Status code "F" must be manually changed to "A" to be activated.

A position can be closed by changing the Position Status code to "C" and entering today's date or a past date in the Close Date. The user can have the system close the position on a specified date by leaving the Position Status code "A" "H" or "F" and entering a future close date. When the date is reached the system will automatically close the position by changing the Position Status to "C" and copying the Close Date to the Status Date.

A position with incumbents cannot be set to "C". PCDB screen 002 edit will not allow a user to change a Position Status to "C" if the position has incumbents. When a future close date is reached and the position still has incumbents, the system will set the Position Status code to "S" to indicate the position is closing. The Position Status "S" indicates the position is closed to new assignments but currently has incumbents that should be removed. The position will show on the Position Control Discrepancy Report (POSR060) until the incumbents are removed. The system will change the Position Status from "S" to "C" in the nightly process after the last incumbent is removed from the position by termination or by transfer to another position.

Position Status code "I" indicates an inactive position. "I" is a system-generated code created during the year-end roll process, where the Position Control file is adjusted for the new fiscal year. If a position from the old fiscal year has incumbents but has not been created in the new fiscal year, during the year-end roll the system will add the position to the new fiscal year with the "I" status code. New assignments cannot be made to the position with an “I” status. The system will automatically close the position when the last incumbent is removed from the position by termination or by transfer and change the status from “I” to “C” through the nightly process.
Screen V-17.a — PCDB screen 002 - Future Active Date

Screen V-17.a shows a position with a current Position Status of "H" that the system will automatically activate on 08/15/01. The system will change the Position Status code to "A" and set the Status Date to 08/15/01 in the overnight batch process.

Screen V-17.b — PCDB screen 002 - Future Close Date

Screen V-17.b shows a position with a current Position Status of "A" that the system will automatically close on 08/01/02, provided the position does not have incumbents. The system will change the Position Status code to "C" and set the Status Date to 08/01/02 in the overnight batch process.
POSITION CONTROL DATABASE

Deleting A Position
A position might be deleted for the following reasons:

- The position was entered in error and must be removed.
- The position was carried over from the prior year and is not authorized in the current fiscal year budget.

Deleting a position is a two-step process. First, the position must be closed and show a Position Status of "C" on the Basic Position Information Screen (002). Second, the closed position is deleted.

**Step 1 - Closing the Position** (If the position is not already closed)

Change the Position Status to "C" on PCDB screen 002 and enter today's date or a past date in the close date. The position can be closed at a future time by leaving the current Position Status code and entering a future date in the close date.

Note: The system will not allow a position with incumbents to be closed. When a future close date is reached and the position has incumbents, the system will change the Position Status code to "S" for "closing". New assignments cannot be made to the position and when the incumbents are removed the system will automatically close the position. A position cannot be deleted while the Position Status code is "S". The district must wait for the system to change the Position Status code to "C" before step 2 can be performed.

**Step 2 - Deleting the Position**

Enter a "D" in the Action field above District and Transmit. *See screen V-21.a*

The screen will respond with a message "Please Review Data On Screen - OK to Delete!" Enter an asterisk "*" to confirm the delete. If any other code is entered, the delete will not be processed. *See screen V-21.b*

**Reports Generated**

Deleting a position will produce a Position Profile Form and Position Change Report POSR030.
Screen V-21.a — PCDB screen 002 - Enter "D" to Delete Position

** PC - BASIC POSITION INFORMATION **

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POSITION CLOSED FOR BUDGET REDUCTIONS

(002) - ENTER YOUR CHANGES.

TRAN: 002  POSITION NUMBER: 615329  FISCAL YEAR: 02  DISTRICT: 10011

Screen V-21.b — PCDB screen 002 - Enter "**" to Confirm the Delete

** PC - BASIC POSITION INFORMATION **

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POSITION CLOSED FOR BUDGET REDUCTIONS

(002) - PLEASE REVIEW DATA ON SCREEN. OK TO DELETE?

TRAN: 002  POSITION NUMBER: 615329  FISCAL YEAR: 02  DISTRICT: 10011
POSITION CONTROL DATABASE

Job Sharing
Partial FTE

Some districts offer job-sharing programs where two or more part-time employees share a single job. Each employee receives a part-time salary but both employees are eligible for benefits. Typically a current employee wishing to reduce their work hours finds someone willing to work the remainder of their time if they both can receive benefits. The system provides two methods to support job sharing, (1) Partial FTE and (2) job splitting.

1 - Partial FTE - Each employee assignment is allocated a fraction of the FTE so that the total FTE for the position equals one job. Employee A is assigned .5 FTE and employee B is assigned .5 FTE.

NOTE: The allocation for the position benefits may have to increase because the district provides benefits to both employees. This method will work only if both employees will have the same job classification, work location, and labor accounts for their part time jobs.

Screen V-24 — PCDB screen 002 - Partial FTE - 1.00 FTE

Screen V-24 shows a PCDB screen 002 for an Account Specialist position with a FTE allocation of 1.000. Two employees have been allowed to "job share" the position. Screen V-25.a shows Faye Ewing is assigned to the position at 50 percent full-time. Screen V-25.b shows Irene Fox is assigned to the position at 50 percent full-time. For our sample, both employees receive full time benefits. The district cost allocation for the position is one full salary and two benefit packages.
Screen V-25.a — EDB screen 005 Share Position "876431" - .50 FTE

** PER - SALARY/PAY RATE - UPD **  0105
TG9995833  EWING, FAYE  EFFEC DATE: 07 01 01 ACTNS:  PRIME  JOB:P

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(002) - ENTER YOUR CHANGES.

Screen V-25.b — EDB screen 005 Share Position "876431" - .50 FTE

** PER - SALARY/PAY RATE - UPD **  0105
RF9995833  FOX, IRENE  EFFEC DATE: 07 01 01 ACTNS:  PRIME  JOB:P

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| STIPENDS                               |
|                                        |

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(002) - ENTER YOUR CHANGES.

TRANS: 004 EID: TG9995833 JOB: 3 DISTRICT: 10011
2 - **Splitting a Position** - The original full-time position is split into two or more part-time positions. The original position is identified as the "master" position and the other part-time positions are coded as "subsidiary" positions linked to the master position.

The FTE count in the original position is lowered and the word "MASTER" is entered in the Master Position field on screen 002. The new subsidiary positions are created with a portion of a FTE. The total of all the split positions must equal the FTE total of the original position. The position number of the master position is entered in the Master Position field on each subsidiary position. A benefit package is allocated to each position.

The Position Splitting method is valuable if the split jobs do not work at the same location or the jobs are charged to different labor accounts.

*An example of a split position is displayed on the following page:*

- Screen V-27.a shows position "876355" is the master position. The word "Master" is entered in the master position field.

- Screen V-27.b shows position, "876356" is the subsidiary position. The position number of the master position is entered in the master position field, "876355".

*Each position has an FTE allocation of .50. The total FTE of both positions equals the 1.0 FTE allocation of the original job. Both positions have a benefit package allocation. The "master" position is assigned to H7200 work location while the "subsidiary" position is assigned to H7100. The two positions may be assigned to different labor accounts.*
** PC - BASIC POSITION INFORMATION **

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<thead>
<tr>
<th>JOB CLASS</th>
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** POSITION INFORMATION **

- **Position Status**: A
- **Active Close Date**: 07/01/01
- **Prev New Master**: 876355

** Available Filled Acting Reserved Act/Rsv Requisitioned Total Vacant **

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** POS WORK LOC **

- **Code/Sub-Site**: H7200
- **Work Location Title**: IBS ACCOUNTING
- **Report Group**: MM

** COMMENTS **

- FYTD Hours: _______
- Days: _______
- Pay: $ _______

(002) - ENTER YOUR CHANGES.

TRANS: 002  POSITION NUMBER: 876355  FISCAL YEAR: 02  DISTRICT: 10011

---

Screen V-27.b — PCDB screen 002 - Subsidiary Position

** PC - BASIC POSITION INFORMATION **

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<tr>
<th>JOB CLASS</th>
<th>JOB TITLE</th>
<th>TYPE</th>
<th>RANK</th>
<th>METHOD</th>
<th>UNITS</th>
<th>DOLLARS</th>
</tr>
</thead>
<tbody>
<tr>
<td>773000</td>
<td>INT CLERK</td>
<td>N</td>
<td>F</td>
<td></td>
<td></td>
<td>0.5000</td>
</tr>
</tbody>
</table>

** POSITION INFORMATION **

- **Position Status**: A
- **Active Close Date**: 07/01/01
- **Prev New Master**: 876356

** Available Filled Acting Reserved Act/Rsv Requisitioned Total Vacant **

<table>
<thead>
<tr>
<th>TOTAL</th>
<th>VACANT</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.5000</td>
<td>0.0000</td>
</tr>
</tbody>
</table>

** POS WORK LOC **

- **Code/Sub-Site**: H7100
- **Work Location Title**: DISTRICT OFFICE
- **Report Group**: MM

** COMMENTS **

- FYTD Hours: _______
- Days: _______
- Pay: $ _______

(002) - ENTER YOUR CHANGES.

TRANS: 002  POSITION NUMBER: 876356  FISCAL YEAR: 02  DISTRICT: 10011
(Intentionally left blank)
POSITION CONTROL DATABASE

Requisition Processing
(Intentionally left blank)
The system provides two ways to create position requisitions:

- Entered manually on PCDB screen 006
- *System-generated* by future EDB assignments on EDB screens 004 and 104

A requisition for a position can be manually created by entering the requisition information on PCDB screen 006 or the system will automatically create a requisition when a future assignment is entered on EDB screen 004 or EDB screen 104.

A Position Requisition Form is automatically produced by the system when a requisition is created or when requisition information is updated. See Position Requisition Form Section VI-1.

*Screen V-31 shows requisition "02000008" manually created. Screen V-32.a shows the EDB screen 004 future assignment that created the requisition. Art Garcia is assigned to position "876356" with a job status "F" and a status effective of 08/01/01.*

*Screen V-32.b shows a future position number change for Faye Ewing. The system automatically created a requisition [not shown] for position "854321" when the EDB screen 104 was entered.*

**Screen V-31—PCDB 006 - Requisition Manually Created**

```
** PC - POSITION REQUISITION - UPD **
2002 876356 ADMIN AIDE LAST CHANGE DATE 00 00 00
REQUISITION NUMBER 02000008

REQUISITION DATE FILED STATUS EQUIVALENT
06 01 01 A 1.000

DOLLAR WORK LOCATION
H7100 DISTRICT OFFICE

REQUISITION MANAGER NAME CONTACT EXT
DONNA FLANAGAN 310 922 3321

REQUISITION REQUESTED NAME
ART GARCIA

START DATE END DATE PERMANENT
08 01 01 ___ ___ P

PERSONNEL REQUISITION COMMENTS
LATERAL TRANSFER

(005) - UPDATE FROM PREVIOUS SCREEN SUCCESSFUL.
TRANS: 006 POSITION: 876356 FISCAL YR: 02 RQSN: 02000008 DISTRICT: 10011
```
Creating A Requisition (EDB)

**PER - JOB ASSIGNMENT - UPD**

<table>
<thead>
<tr>
<th>JOB</th>
<th>POSITION</th>
<th>BOARD APPROVAL</th>
<th>CREDENTIAL</th>
<th>CRED EXP DATE</th>
<th>ACAD RANK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>876356</td>
<td></td>
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<table>
<thead>
<tr>
<th>JOB CLASS</th>
<th>JOB TYPE</th>
<th>JOB STS</th>
<th>STATUS DATE</th>
<th>JOB PERMANENCY</th>
<th>JOB FAM</th>
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<tr>
<td>773000</td>
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<td>F</td>
<td>08 01 01</td>
<td>O</td>
<td>CLASS PR</td>
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**ADMIN AIDE**

<table>
<thead>
<tr>
<th>WORK LOCATION</th>
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<th>EXT</th>
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<tbody>
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**DISTRICT OFFICE**

<table>
<thead>
<tr>
<th>ANNIV PASS</th>
<th>EVAL</th>
<th>EVAL BARG</th>
<th>UNIT</th>
<th>MILEAGE</th>
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</thead>
<tbody>
<tr>
<td>07 01 02</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**REASON**

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<tr>
<th>TYPE</th>
<th>BEGIN</th>
<th>END</th>
<th>REASON</th>
<th>DATE</th>
<th>REHIRE</th>
<th>ELIG</th>
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</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>

(005) - UPDATE FROM PREVIOUS SCREEN SUCCESSFUL.

**TRANS: 004**

**PER - FUTURE JOB ASSIGNMENT - UPD**

<table>
<thead>
<tr>
<th>TG9995833</th>
<th>EWING,FAYE</th>
<th>EFFEC DATE: 07 01 01</th>
<th>ACTNS: 91</th>
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**FUTURE IMPDATE: 07 01 01**

**SCREEN 003: PRIMARY JOB: PAY LOC: PRIME JOB: P**

<table>
<thead>
<tr>
<th>JOB SET</th>
<th>POSITION</th>
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<tbody>
<tr>
<td>1 A</td>
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<table>
<thead>
<tr>
<th>JOB CLASS</th>
<th>JOB TYPE</th>
<th>JOB STS</th>
<th>STATUS DATE</th>
<th>JOB PERMANENCY</th>
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<td>315000</td>
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<td>F</td>
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<td>O</td>
<td>CLASS PR</td>
<td>GO</td>
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**ADMIN AIDE**

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**IBS ACCOUNTING**

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<tbody>
<tr>
<td>07 01 02</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

**REASON**

<table>
<thead>
<tr>
<th>TYPE</th>
<th>BEGIN</th>
<th>END</th>
<th>REASON</th>
<th>DATE</th>
<th>REHIRE</th>
<th>ELIG</th>
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</thead>
<tbody>
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</tr>
</tbody>
</table>

(005) - UPDATE FROM PREVIOUS SCREEN SUCCESSFUL.

**TRANS: 104**
Position requisitions can be deleted or purged from the system two ways:

- Automatically deleted by the system
- Manually deleted on PCDB screen 006

If a requisition has been created for a position, it will be purged automatically when an employee is assigned to the position on EDB screen 004. Future position number changes on the EDB will delete a requisition when they are implemented. Requisitions linked to positions being deleted will be deleted with the position.

Requisitions can be manually deleted by a two-step process:

**Step 1** - Enter "D" in the action field above district on the PCDB Requisition Screen (006) Press Transmit and the system will respond with "Please Review Data On Screen - OK To Delete?"

**Step 2** - Enter an asterisk "*" in the action field and transmit to complete the deletion. If any other response is entered the requisition will not be deleted.
Screen V-34.a — PCDB screen 006 - DELETE REQUISITION Step 1 Enter "D"

```
** PC - POSITION  REQUISITION - UPD **
2002 876356 ADMIN AIDE 07 01 01
REQUISITION NUMBER 02000008

REQUISITION REQUISITION FULL TIME DOLLAR WORK LOCATION
DATE FILED STATUS EQUIVALENT CONTROL CODE/SUB-SITE
06 01 01 A 1.000 H7100 DISTRICT OFFICE

REQUISITION MANAGER NAME CONTACT EXT
DONNA FLANAGAN 310 922 3321

REQUISITION REQUESTED NAME START DATE END DATE PERMANENT
ART GARCIA 08 01 01 P

PERSONNEL REQUISITION COMMENTS
LATERAL TRANSFER

(002) - ENTER YOUR CHANGES.
TRANS: 006 POSITION: 876356 FISCAL YR: 02 RQSN: 02000008
```

Screen V-34.a shows the "D" entered on PCDB screen 006 to delete the requisition.

Screen V-34.b — PCDB screen 006 - DELETE REQUISITION Step 2 Enter "*"

```
** PC - POSITION  REQUISITION - UPD **
2002 876356 ADMIN AIDE 07 01 01
REQUISITION NUMBER 02000008

REQUISITION REQUISITION FULL TIME DOLLAR WORK LOCATION
DATE FILED STATUS EQUIVALENT CONTROL CODE/SUB-SITE
06 01 01 A 1.000 H7100 DISTRICT OFFICE

REQUISITION MANAGER NAME CONTACT EXT
DONNA FLANAGAN 310 922 3321

REQUISITION REQUESTED NAME START DATE END DATE PERMANENT
ART GARCIA 08 01 01 P

PERSONNEL REQUISITION COMMENTS
LATERAL TRANSFER

(002) - PLEASE REVIEW DATA ON SCREEN. OK TO DELETE?
TRANS: 006 POSITION: 876356 FISCAL YR: 02 RQSN: 02000008
```

Screen V-34.b shows the "*" entered to confirm the deletion.
POSITION CONTROL DATABASE

Special Topics
(Intentionally left blank)
Creating Next Fiscal Year Positions / Files

The system has a two step process to create positions for the next fiscal year:

- **Step 1 - Copy** current positions to start next fiscal year. At the district's request, usually May or June, current positions are copied to the next fiscal year. Positions that are closed or have an upcoming Close Date are **not** copied.

  All information is copied to the new positions except incumbent records, requisitions, the previous position, and new position fields on the Basic Information Screen (002). The new positions have the same position numbers but are identified for the next fiscal year. After the copy is completed the district may begin adding, changing position information, and deleting positions to start building the next fiscal year position file.

  Once this file is created a district must remember to update position information in the current and next fiscal year. (Both files)

- **Step 2 - Roll** the future fiscal year to current. At the beginning of July, current positions (old year) are matched against the future positions (new year). All incumbents and requisition information is transferred to the future position. If a current position does not have a future match but has incumbents, the position will be copied to the future and set up with a special position status code of "I" indicating INACTIVE. The position is not authorized in the new fiscal year, but it cannot be eliminated until all incumbents are reassigned.

  Any future positions (new year) that have been closed are eliminated from the PCDB. If the future position has a new labor account, incumbents of the position will have their EDB jobs updated to the new account. The jobs that have the “Labor Distribution Overridden” message on EDB 01/006 screen will also be updated with PCDB 10/003. The “Labor Distribution Overridden” message will disappear. The salary and district contribution rates on the Financial Information Screen (004) are updated to the current CDB table rates.

  The final step of the process is to roll all the future positions to the new **current** fiscal year. The old fiscal year PCDB position records are purged from the system.
Renumbering Positions

The major reasons for renumbering a position are to correct an erroneous position number or update the number because the position has changed. If a district chooses to embed special information into the position number, such as job classification code or program number, and the special information changes when the job is reclassified or moved to new funding, the district will need to renumber the position to maintain the coding structure.

POSITION NUMBERS CANNOT BE CHANGED. A FOUR-STEP PROCESS IS REQUIRED TO RENUMBER A POSITION:

- **Step 1** Position Control  Build a new position with the correct number and manually reenter the appropriate information from the current position.

- **Step 2** Personnel  Rehire all incumbents under the new job and the new position created above (step 1) by entering information from the old job EDB screen 004. This will create an EDB job history line for the new number. If the position has a large number of incumbents (over 50) contact School Financial Services to perform an EDB mass change.

- **Step 3** Personnel  Terminate the old jobs.

- **Step 4** Position Control  Close the old position.

EDB job history records of position incumbents will show information under both the old and the new position numbers. The district should not delete the old position from the system if the position had incumbents during the year. The next year-end process will automatically purge the closed position from the system. (See Deleting A Position).

**Using Job Classifications with Position Control**

A common method of managing assignments is to establish a fixed allocation of positions for each job classification. The district can monitor the assignment process by using control reports that list positions for each job classification. The reports show incumbents FTE allocation for the classification, FTE currently assigned, and FTE available for new assignments.

A district must have a well-planned job classification coding system to effectively use job classifications to manage assignments. The efficient maintenance of the CDB Job Classification Table (004) is critical to the successful operation of Position Control.
Using Work Locations with Position Control

A method of managing assignments is to establish a fixed allocation of positions for each work location. The district can monitor the assignment process by using control reports that list positions assigned to each work location. The report lists the positions by job classifications, show incumbents, FTE allocation for the classifications, FTE currently assigned, and FTE available for new assignments.

Where a district is managing positions by work location the efficient maintenance of the CDB Work Location Table (011) is important for the successful operation of Position Control.

"Pool" Positions

Typically, at the beginning of the year personnel will hire a large pool of employees to serve as substitute teachers or classified temporary office workers. At the time of employment the district will not know where an individual will be assigned or how many days or hours they will work during the year. Some employees on a list may never work. Daily and hourly assignments will be recorded through time reporting as each employee works and the proper accounts will be charged for the services as they are provided.

Substitute Teacher Positions

Districts using HRS Position Control will need to establish "pool" positions to support personnel hiring employees to serve on the substitute lists. The pool position can be established with special information:

- Job Classification: "Substitute Teacher List"
- Work Location: "Substitute List"
- Labor Distribution: generic holding account for substitutes
- "P" Pay Allocation: maximum pay for position if applicable

Several substitute pool positions may be created if the district practice is to establish a list of eligible substitutes to work in specific areas, either by location or funding, within the district.

When a long-term substitute assignment is identified, the district can establish a unique FTE position for the service and assign an employee to the position for the duration of the assignment.

Temporary Office Worker Positions

A district that uses classified temporary office workers can establish a pool position to support the personnel list. The pool position can be established with special information:

- Job Classification: "Temporary Office Worker List"
- Work Location: "TOW List"
- Labor Distribution: generic holding account for TOWs
- "P" Pay Allocation: maximum pay for position if applicable

Temporary office worker short-term day-to-day assignments can be processed through time reporting in payroll. Longer-term assignments can be supported by creating limited term positions with a FTE allocation for the duration of the job.
HRS POSITION CONTROL

Special Topics

Student Worker Positions

A district that uses student workers can establish a pool position to support the personnel list. The pool position can be established with special information:

- Job Classification: "Student Worker"
- Work Location: "Student Worker List"
- Labor Distribution: generic holding account for student workers
- "P" Pay Allocation: maximum pay for position if applicable

Student worker short-term day-to-day assignments can be processed through time reporting in payroll. Longer-term assignments can be supported by creating limited term positions with a FTE allocation for the duration of the job.

Summer Session Positions

Districts using HRS Position Control will need to create positions to support summer session assignments. Summer session pool positions can be established with special information:

- Job Classification: "Summer Session" (classification name)
- Work Location: school/program
- Labor Distribution: summer school account
- FTE Allocation: multiple FTE for the pool assignment
- Active Date: date summer school begins
- Close Date: date summer school ends

Limited Term Positions

EDB editing requires that an employee has a different position number for each job. Districts using HRS Position Control will need to establish limited term positions to support limited term personnel assignments. Personnel must have a valid position number to place an employee in a limited term job. The limited term position can be established with special information:

- Job Classification: "LT (classification name)"
- Work Location: location where service is provided
- Labor Distribution: proper account for assignment
- FTE Allocation: "1.0" for each assignment or multiple FTE for "pool" assignments
- Active Date: date assignment begins
- Close Date: date assignment ends
**Work Out Of Class Positions**

Districts that create temporary assignments when an employee works out of classification will need to establish special positions to support the extra assignment. A limited-term position can be established with special information:

- **Job Classification:** "OC [classification name]"
- **Work Location:** location where service is provided
- **Labor Distribution:** proper account for assignment
- **FTE Allocation:** "1.0" for each assignment or multiple FTE for "pool" assignments
- **Active Date:** date assignment begins
- **Close Date:** date assignment ends

**Non-Employee Positions**

Special non-employee positions must be created for districts using the EDB to maintain information on retirees, employee dependents or other types of non-employees. Pool positions for non-employees can be established with special information:

- **Job Classification:** "Retiree" / "Dependent" / "Non-Employee"
- **Work Location:** descriptive "Retirees" / "Dependents" / "Non-Employees"
- **Labor Distribution:** special account (benefits but no salary)
- **"P" Pay Allocation:** allocate $1.00 to monitor that no pay is processed

**Special Assignment Positions**

HRS Position Control requires a position number for each job created on the EDB. Districts using HRS Position Control will need to develop positions to support assignments that are created on the EDB to provide for special situations:

- Automobile Allowance
- Coaching - Certificated
- Coaching - Classified
- Mentor Teacher
- Student Worker
- Salary stipends established as EDB assignments
Unpaid Position Leaves

When a position is monitored by FTE count and an incumbent is on unpaid leave, it creates a vacancy that is identified as "Reserved" on PCDB screen 002. This "Reserved" vacancy can only be filled by a temporary replacement on acting basis, EDB screen 003 job Permanency Indicator "A" Acting. This procedure is very useful to monitor for replacements for employees assigned to work on short-term special projects.

When an employee is temporarily assigned to another position, place the employee on an unpaid leave, to the regular assignment for the duration of the temporary job. Enter the beginning date of the temporary assignment as the beginning date of the unpaid leave and the end date of the temporary assignment as the end date of the leave on EDB screen 004. Create a second position for the temporary assignment with a PCDB screen 002 active date and close date matching the beginning and ending of the limited term assignment.

If a temporary replacement is needed for the regular employee's assignment, on EDB screen 004 assign the replacement to the regular position number with a future termination date matching the end of the regular employee's temporary job and with a Job Permanency code of "A" to indicate the assignment is acting.

On the night of the termination date of the regular employee's temporary second job, the system will automatically:

- terminate the second EDB assignment,
- close the temporary Position on Position Control,
- return the employee from unpaid leave on the regular EDB assignment and
- terminate the temporary replacement on the EDB.

Tracking Replacements (Long Term Substitutes)

The Master Position field on PCDB screen 002 may be used to show a relationship between an absent employee and a temporary replacement. Enter the word "MASTER" in the Master Position field on the position of the employee absent from the job. Enter the position number of the Master Position in the Master Position field on the replacement position. This will link the replacement to the position they are replacing:

- absent employee on position "007890" Enter: "MASTER"
- replacement on position "087651" Enter: "007890"
POSITION CONTROL DATABASE

PCDB Printed Forms
PCDB Position Profile Form provides the districts with a printed copy of the information stored in the system for each position. As a new position is created or when changes are posted to position information on Position Control screens 002, 003, 004, or 005. The system automatically prints a Position Profile Form for the district during the overnight processing.

The purpose of the form is similar to the "EDB-EIR form" and has been designed to be used as a turnaround document where changes to position information can be recorded and stored in a district position file. A district may use a copy of the form to notify a unit manager of the position information. The unit manager can use the form as a turnaround document to submit position information changes back to the Position Control area.

The Position Profile Form is divided into three sections with each section showing information from one of the PCDB position information screens:

(002) Basic Position Information
(003) Labor Distribution
(004) Position Financial Information

The screen number for each section on the form is printed in a box on the left side of the form. Space has been provided to record changes above each of the Position Control data fields. Refer to the screen descriptions, in the PCDB Information section, for information regarding the data showing on the form.

A district can choose the number of copies, 0 to 5, of the Position Profile Forms that are printed by the system. A district will be set up automatically to receive one copy. If a district wants a different number of copies, they must notify School Financial Services. The number of copies printed for the district is stored in the District Profile Table (020).

Sample form VI-2 shows a 2000-01 position for a PAINTER with 6.000 FTE assigned to work in the MAINTENANCE DEPARTMENT.
# HRS POSITION CONTROL

**VI-4 — PCDB - Position Requisition Form**

## POSITION REQUISITION FORM

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<td>1. Position Number</td>
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<td>2001 - 01000361</td>
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<td>3. District Name</td>
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<td>7. Dollar Control</td>
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<td>8. Work Location</td>
<td>LA SEDA ELEMENTARY</td>
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<td>9. Requisition Manager Name</td>
<td>GALLEGO, JANELLE</td>
</tr>
<tr>
<td>10. Requisition Contact Number</td>
<td>( ) - EXT</td>
</tr>
<tr>
<td>11. Requested Name</td>
<td>GALLEGUZ, JANELLE</td>
</tr>
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<tr>
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<td>14. Acting/Permanent</td>
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## BASIC POSITION DATA

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<table>
<thead>
<tr>
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<th>Related Position</th>
<th>Prev Position</th>
<th>New Position</th>
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<tr>
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<tr>
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<th>Report Group</th>
<th>Bargaining Unit</th>
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<td>-A</td>
<td>LA SEDA ELEMENTARY</td>
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## POSITION LABOR DISTRIBUTION DATA

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<td>201</td>
<td>202</td>
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</tbody>
</table>

FORM REQU (REV. 04-09-01)

PC VI - 4
PCDB Position Requisition Form provides the districts with a printed copy of the information stored in the system for each position requisition. As a new position requisition is created or when changes are posted to the requisition information on Position Control screen 006, the system automatically prints a Position Requisition Form for the district during the overnight processing.

The purpose of the requisition form is similar to the "EDB - EIR form" and has been designed to be used as a turnaround document. Where changes to requisition information can be recorded and stored in a district position requisition file. A district may use a copy of the requisition form to notify a unit manager of requisition information. The unit manager can use the form as a turnaround document to submit requisition information back to the Position Control area.

The Position Requisition Form is divided into three sections with each section showing information from a PCDB position information screen:

(006) Position Requisition Information  
(002) Basic Position Information  
(003) Labor Distribution

Space has been provided to record changes, above each of the position requisition data fields, on the form. Refer to the screen descriptions in the PCDB Information section for information regarding the data showing on the form.

A district can choose the number of copies, 0 to 5, of the Position Requisition Forms that are printed by the system. A district will be set up automatically to receive one copy. If a district wants a different number of copies, they must notify School Financial Services. The number of copies printed for the district is stored in the District Profile Table (020).

*Sample form VI-4 shows a Position Requisition, # 2001-01000361, for a CUSTODIAN-12 MO. with 0.5000 FTE.*
POSITION CONTROL DATABASE

PCDB Reports
<table>
<thead>
<tr>
<th>POSITION NUM</th>
<th>ELEM NO</th>
<th>ELEMENT NAME</th>
<th>OLD VALUE</th>
<th>NEW VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002-000043</td>
<td>0006-0</td>
<td>JOB CLASS</td>
<td>000500</td>
<td>000500</td>
</tr>
<tr>
<td>N99A</td>
<td>0007-0</td>
<td>SEG01 CHG DATE</td>
<td>100000</td>
<td></td>
</tr>
<tr>
<td></td>
<td>0008-0</td>
<td>SEG07 CHG DATE</td>
<td>20020307</td>
<td>20020701</td>
</tr>
<tr>
<td>2002-000212</td>
<td>0008-0</td>
<td>SEG07 CHG DATE</td>
<td>20020307</td>
<td>20020701</td>
</tr>
<tr>
<td>N99A</td>
<td>0703-1</td>
<td>ACCOUNT OBJECT</td>
<td>2912</td>
<td>2130</td>
</tr>
<tr>
<td></td>
<td>0704-1</td>
<td>ACCOUNT GOAL</td>
<td>07100</td>
<td>18000</td>
</tr>
<tr>
<td></td>
<td>0705-1</td>
<td>ACCOUNT LOCATION</td>
<td>0010</td>
<td>0005</td>
</tr>
<tr>
<td>2002-900003</td>
<td>0006-0</td>
<td>JOB CLASS</td>
<td>000005</td>
<td></td>
</tr>
<tr>
<td>N99A</td>
<td>0007-0</td>
<td>SEG01 CHG DATE</td>
<td>100000</td>
<td></td>
</tr>
<tr>
<td></td>
<td>0008-0</td>
<td>SEG01 CHG DATE</td>
<td>00000000</td>
<td>20020701</td>
</tr>
<tr>
<td>2002-999991</td>
<td>0103-1</td>
<td>CNTL FTE</td>
<td>00020000</td>
<td>00200000</td>
</tr>
<tr>
<td>2002-002862</td>
<td>0105-1</td>
<td>POS STATUS DATE</td>
<td>\</td>
<td>20020701</td>
</tr>
<tr>
<td>R81A</td>
<td>0106-1</td>
<td>POS ACTIVE DATE</td>
<td>\</td>
<td>20020701</td>
</tr>
<tr>
<td></td>
<td>0110-1</td>
<td>WORK LOC CODE</td>
<td>\</td>
<td>00320</td>
</tr>
<tr>
<td></td>
<td>0111-1</td>
<td>WORK LOC SITE</td>
<td>\</td>
<td></td>
</tr>
<tr>
<td></td>
<td>0112-1</td>
<td>EDUCATIONAL_LVL</td>
<td>\</td>
<td></td>
</tr>
<tr>
<td></td>
<td>0113-1</td>
<td>BARGAINING UNIT</td>
<td>\</td>
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<tr>
<td></td>
<td>0114-1</td>
<td>MASTER POSITION</td>
<td>\</td>
<td></td>
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<tr>
<td></td>
<td>0115-1</td>
<td>REPORT GROUP</td>
<td>\</td>
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<tr>
<td></td>
<td>0201-2</td>
<td>POS COMMENT 1</td>
<td>\</td>
<td></td>
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<tr>
<td></td>
<td>0202-2</td>
<td>POS COMMENT 2</td>
<td>\</td>
<td></td>
</tr>
<tr>
<td></td>
<td>0203-2</td>
<td>POS COMMENT 3</td>
<td>\</td>
<td></td>
</tr>
<tr>
<td></td>
<td>0204-2</td>
<td>FILLER 02</td>
<td>\</td>
<td></td>
</tr>
</tbody>
</table>
The Position Change Register (POSR030) is a system control report designed for the district staff responsible for maintaining the Position Control information. The report lists changes to Position Control information on PCDB screens 002, 003, 004, and 005. The report shows the position being updated, the information that was changed and the new information that was entered. The old information lists under the "old value" column in the center of the report and the new information lists on the right side under the "new value" column. The report is sent to the districts each day and reflects the Position Control changes posted the prior workday.

**Report Organization**

The report is organized by Job Type and Position Number with each Job Type starting on a new page.

*Report sample VI-8 shows 2001-02 position "999991" with a change from "2.0" CNTL FTE to "200.000" FTE.*
### Position Control Discrepancy Report (POSR060)

<table>
<thead>
<tr>
<th>POSITION</th>
<th>POSITION STATUS / DATE</th>
<th>EXCEPTION</th>
<th>CONDITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>000003-N</td>
<td>07/01/98</td>
<td>0702</td>
<td>PCDB LABOR DISTRIBUTION ACCOUNT &quot;9999999999999999999&quot; NOT FOUND ON LABOR FILE</td>
</tr>
<tr>
<td>000007-N</td>
<td>07/01/98</td>
<td>0702</td>
<td>PCDB LABOR DISTRIBUTION ACCOUNT &quot;010-113000-50000-0000-1130-06220000&quot; NOT FOUND ON LABOR FILE</td>
</tr>
<tr>
<td>000393-N</td>
<td>07/01/98</td>
<td>0001</td>
<td>JOB CLASS &quot;000241&quot; NOT FOUND ON JOB CLASS CONTROL TABLE</td>
</tr>
<tr>
<td>00435-N</td>
<td>07/01/98</td>
<td>0702</td>
<td>PCDB LABOR DISTRIBUTION ACCOUNT &quot;010-115000-13900-0000-2937-0030000&quot; NOT FOUND ON LABOR FILE</td>
</tr>
<tr>
<td>000661-N</td>
<td>07/01/98</td>
<td>0701</td>
<td>INCOMPLETE PCDB; LABOR DISTRIBUTION MISSING</td>
</tr>
<tr>
<td>000041-N</td>
<td>03/06/98</td>
<td>1004</td>
<td>EDB WORK LOC:00001 PCDB:00005 MISMATCH (SSN XXXXXX1212 JOB 2) AUGUST,ROBERT</td>
</tr>
<tr>
<td>00164-N</td>
<td>03/06/98</td>
<td>1003</td>
<td>EDB JOB CLASS:001000 PCDB:002049 MISMATCH (SSN XXXXXX5121 JOB 3) RILEY,SPURGEON</td>
</tr>
<tr>
<td>105001-N</td>
<td>07/01/98</td>
<td>1002</td>
<td>POSITION NUMBER NOT ON PCDB (SSN XXXXXX1242 JOB 1) CLIFTON,ANDY</td>
</tr>
<tr>
<td>00677</td>
<td></td>
<td>0901</td>
<td>EDB LABOR DISTRIBUTION ACCOUNT ALL 99999'S (SSN XXXXXX1112 JOB 2) STRINE,JOHN</td>
</tr>
<tr>
<td>000004-N</td>
<td>09/01/98</td>
<td>2009</td>
<td>PAY OVER 80% OF LIMIT 290000.00 ACCOUNTS:SLATER,KELLY</td>
</tr>
<tr>
<td>00359-N</td>
<td>03/31/97</td>
<td>2007</td>
<td>HOURS OVER 80% OF LIMIT 65.00 ACCOUNTS:FOSTER,STEVE</td>
</tr>
<tr>
<td>00356-N</td>
<td>03/06/98</td>
<td>3018</td>
<td>EDB JOBS EXCEED FTE ALLOCATION (SSN XXXXXX2220 JOB 1) JOHNSON,CHUCK</td>
</tr>
<tr>
<td>000210-N</td>
<td>09/01/96</td>
<td>3016</td>
<td>CLOSING POSITION ASSIGNED (SSN XXXXXX1110 JOB 2) ROOKS,CLARA</td>
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<tr>
<td>000502-N</td>
<td>09/01/97</td>
<td>3022</td>
<td>PAY EXCEEDS LIMIT 150.00</td>
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<tr>
<td>000706-N</td>
<td>09/03/97</td>
<td>3020</td>
<td>HOURS EXCEED LIMIT 1184.00</td>
</tr>
</tbody>
</table>

**Report Description**

- **REPORT:** POSR060 - HRS Position Control Discrepancy Report
- **DISTRIBUTION:** District - 1 Copy
- **FREQUENCY:** Daily
- **RETENTION:** Keep current only
- **USE:** To identify and correct errors/discrepancies between PCDB & EDB
The Position Control Discrepancy Report (POSR060) is a system control report designed for district staff responsible for maintaining the Position Control information. The report provides a listing of exception conditions the system finds by comparing PCDB data, EDB data and CDB data. The report lists the following type of discrepancy conditions:

- EDB Jobs exceed the position FTE allocation (FTE POSITIONS ONLY)
- Year-To-Date Pay, Hours or Days is over 80% of the position allocation *
- Year-To-Date Pay, Hours or Days exceeds the position allocation *
- EDB Jobs on "hold", "frozen", or "closed" positions
- Employee not on PCDB
- Position number not on PCDB
- PCDB Labor Distribution not on Labor File
- EDB Labor Distribution "99-99999-99999999-9999" (error account)
- Incomplete PCDB - missing Labor Distribution
- EDB Job Class: PCDB Mismatch
- EDB Work Location, PCDB Work Location Mismatch
- PCDB Labor Distribution Account inactive/deleted on Labor File

* Message will not show for positions with a Pay/Hours/Days Allocation of Zero.

The report is sent to the districts each day and shows error conditions found during the nightly processing. This is the main report that identifies that personnel assignments are within the position allocation established in the district budget. The staff of both Position Control and Personnel will need to work together to correct discrepancy conditions identified on the report. Discrepancy messages will continue to show until either Position Control records (PCDB) or Personnel records (EDB) are corrected.

Report Organization

The report is separated by Job Type (Certificated, Classified) the exception condition messages are organized by Position Number within four discrepancy categories 1) Accounting, 2) EDB, 3) Urgent, and 4) Fatal. The report shows the position number, the status of the position, and a message describing the problem.

Report VI-10 shows discrepancies for fiscal year 2002 Job Type "N". Many types of discrepancy conditions are listed in the sample report. Note the message under the “Accounting section for position "000003": "EDB Labor Distribution Account All 99999's". The message describes a condition where either the Labor Distribution information has not been entered on PCDB screen 003 in Position Control or the employee assignment has not been properly tied to Position Control. The message should receive immediate attention by the Position Control staff. The error is corrected by entering the Labor Distribution for the position or by updating EDB screen 004 that should properly link the assignment to Position Control. Employees assigned to the position will have pay charged to the error account "9999..." if the error is not corrected before the next payroll.
**Position Control Position List (POSR020)**

<table>
<thead>
<tr>
<th>REPORT:</th>
<th>POSR020 - HRS Position Control - Position List</th>
</tr>
</thead>
<tbody>
<tr>
<td>DISTRIBUTION:</td>
<td>District - 1 Copy</td>
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<tr>
<td>FREQUENCY:</td>
<td>Monthly and upon request</td>
</tr>
<tr>
<td>RETENTION:</td>
<td>Keep current only</td>
</tr>
<tr>
<td>USE:</td>
<td>To keep track of positions by Position Number sequentially</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>POSITION</th>
<th>METHOD</th>
<th>FTE</th>
<th>VACANT</th>
</tr>
</thead>
<tbody>
<tr>
<td>000003 COUNSELOR</td>
<td>FTE</td>
<td>1.000</td>
<td>1.000</td>
</tr>
<tr>
<td>RESVD (LV): 1.0000</td>
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<tr>
<td>OCCUP PREP DIV</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>LABOR DISTRIBUTIONS: 010-115000-38000-00000-1110-0000000-100.000%</td>
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</tr>
<tr>
<td>RIGGINS, ANN</td>
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<tr>
<td>&quot;UPD LV&quot;</td>
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<tr>
<td>FTE</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>000007 081000-COORD PROF REL</td>
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</tr>
<tr>
<td>METHOD: FTE</td>
<td>1.0000</td>
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<tr>
<td>FTE</td>
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<tr>
<td>000011 031000-DIR II CURR&amp;INSTR STRA</td>
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</tr>
<tr>
<td>METHOD: FTE</td>
<td>1.0000</td>
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<tr>
<td>FTE</td>
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</tr>
<tr>
<td>000019 190000-COORD IN CHG OCC PREP</td>
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</tr>
<tr>
<td>METHOD: FTE</td>
<td>1.0000</td>
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<td>FTE</td>
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<tr>
<td>000020 913000-DD SUB TEACHER</td>
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<tr>
<td>METHOD: PAY</td>
<td>0.00</td>
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<tr>
<td>FYTD HOURS:</td>
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<td></td>
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<td>PAY:</td>
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<tr>
<td>DORSEY, SUSAN</td>
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<tr>
<td>CAHNDLER, WILLIAM</td>
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<tr>
<td>SUPJOHN, HUBERT</td>
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<tr>
<td>KEPPEL, MARK</td>
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</tr>
<tr>
<td>&quot;UPD LV&quot;</td>
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<td></td>
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</tr>
<tr>
<td>MERLOT, JUNE</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>SEAMAN, WYLE</td>
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</tr>
<tr>
<td>STRINE, JOHN H</td>
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</tr>
<tr>
<td>000021 METHOD: PAY</td>
<td>0.00</td>
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<td></td>
</tr>
<tr>
<td>CERT SUB JUV CRT SCH</td>
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</tr>
<tr>
<td>FYTD HOURS:</td>
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<td>DAYS:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PAY:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DORSEY, SUSAN</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>&quot;UPD LV&quot;</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MERLOT, JUNE</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
Position Control Position List (POSR020) is a control report designed for the Position Control area. The report provides a listing of position information by position number within Job Type (certificated, classified, Board, etc.). The report shows position status information and lists position incumbents. The report is sent to the district once a month and is available by special request.

**Report Organization**

The report is organized by Job Type and Position Number. Each Job Type begins on a new page.

The report shows: the position number; the control method used to monitor the position with the position allocation; the status of each position; the location; the position's labor distribution; and an alphabetical list of employees assigned to the position. Filled, Available, (etc.) FTE counts are provided if the position is monitored by FTE and the position is active. Hold, Frozen, Inactive, Closing and Closed positions do not show FTE counts. Positions monitored by Hours, Days, or Pay do not show counts. A comment entered on PCDB screen 002 will print on the report.

*Report VI-12 shows a listing of Certificated positions in position number order. The report has position 000003 with an allocation of 1 FTE. The active position has one incumbent ANA RIGGINS and has an allocation for one FTE that is vacant because the Incumbent is on unpaid leave. The position is assigned to the OCCUP PREP DIV and has an account "010-115000-38000-00000-1110-000000-100.000%".*
# Position Control Account List (POSR080)

**Report Description**

**REPORT:** POSR080 - HRS Position Control - Account List  
**DISTRIBUTION:** District - 1 Copy  
**FREQUENCY:** Monthly and upon request  
**RETENTION:** Keep current only  
**USE:** To keep track of positions by Labor Distribution Account

### Position Control Account List (POSR080)

```plaintext
POS080/PC5680/XX/062696  HRS POSITION CONTROL ACCOUNT LIST          PAGE NO.  1
RUN TIME   1:03  AM    DISTRICT 22222 - L A COUNTY OFFICE OF EDUCATION  FISCAL YEAR 2002  RUN DATE  07/01/01

JOB TYPE: CLASSIFIED

010-113000-50000-00000-2130-0022000  
180000-COORD EMP REL  POSN #: 000128  METHOD: FTE  1.0000  
FILLED: 0.6500  
PERSONNEL SERVICES  
MCKITTEN, MAY "PD LV"  

**ACTIVE FTE POSITIONS**  
010-113000-50000-00000-2130-0022000  :  1  
FILLED: 0.6500  

010-113000-50000-00000-2130-0522000  
046000-ASST ADMIN PERS SVCS  POSN #: 000036  METHOD: FTE  1.0000  
FILLED: 1.0000  
PERSONNEL SERVICES  
STALLINGS, JOHN "PD LV"  

**ACTIVE FTE POSITIONS**  
010-113000-50000-00000-2130-0522000  :  1  
FILLED: 1.0000  

010-115000-070000-2031-0030000  
180000-COORD EMP REL  POSN #: 000036  METHOD: FTE  1.0000  
FILLED: 1.0000  
PERSONNEL SERVICES  
COLEMAN, JESSIE "PD LV"  

0183000-COORD HUMAN RES  POSN #: 000137  METHOD: FTE  1.0000  
FILLED: 1.0000  
PERSONNEL SERVICES  
LARKER, GEORGE "PD LV"  

0181000-COORD PROF REL  POSN #: 000007  METHOD: FTE  1.0000  
FILLED: 1.0000  
PERSONNEL SERVICES  
PEYTON, WALTER "PD LV"  
```
The Position Control Account List (POSR080) is a control report designed for the Position Control area. The report provides a listing of position information by account (Fund, Resource/Project Year, Goal, Function, Object, School/Location and Percent). The report shows position status information and lists position incumbents. The report is sent to the district once a month and is available by special request.

Report Organization

The report is organized by the Labor Distribution account code (Fund, Resource/Project Year, Goal, Function, Object, School/Location and Percent) entered in Position Control for each position. Within each account, positions are listed by Job Classification Title and Position Number.

The report shows: the Labor Distribution, Job Class, Position Number, Control Method, Incumbent Status, The Work Location, and an alphabetical list of employees assigned to the position. Filled, Available, (etc.) FTE counts are provided if the position is monitored by FTE and the position is active. Hold, Frozen, Inactive, Closing and Closed positions do not show FTE counts. Positions monitored by Hours, Days, or Pay do not show FTE counts. A comment entered on PCDB screen 002 will print on the report.

Report VI-14 shows a listing of Classified positions by account code. Account 010-113000-50000-00000-2130-0622000 lists one active position, 000128, with an allocation of one FTE. The position is filled and the incumbent is on "PD" LEAVE.
## Position Control Job Class List (POSR070)

### REPORT
- **REPORT:** POSR070 - HRS Position Control Job Class List
- **DISTRIBUTION:** District - 1 Copy
- **FREQUENCY:** Monthly and upon request
- **RETENTION:** Keep current only
- **USE:** To keep track of positions by Job Class

### Report Description

<table>
<thead>
<tr>
<th>JOI TYPE</th>
<th>POSN TYPE</th>
<th>POSN #</th>
<th>METHOD</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>020000-ACCOUNTING TECHNICIAN</td>
<td>POSN #: 000145</td>
<td>METHOD: FTE</td>
<td>1.0000</td>
<td></td>
</tr>
<tr>
<td>046000-ASST ADMIN PERS SVCS</td>
<td>POSN #: 000036</td>
<td>METHOD: FTE</td>
<td>1.0000</td>
<td></td>
</tr>
<tr>
<td>016000-ASST SUPT EDUC SVCS</td>
<td>POSN #: 000035</td>
<td>METHOD: FTE</td>
<td>1.0000</td>
<td></td>
</tr>
<tr>
<td>180000-COORD EMP REL</td>
<td>POSN #: 000132</td>
<td>METHOD: FTE</td>
<td>1.0000</td>
<td></td>
</tr>
<tr>
<td>183000-COORD HUMAN RES</td>
<td>POSN #: 000137</td>
<td>METHOD: FTE</td>
<td>1.0000</td>
<td></td>
</tr>
<tr>
<td>190000-COORD IN CHG OCC PREP</td>
<td>POSN #: 000019</td>
<td>METHOD: FTE</td>
<td>1.0000</td>
<td></td>
</tr>
</tbody>
</table>

### Labor Distributions
- **ACCOUNTING DEPARTMENT**
- **PERSONNEL SERVICES**
- **PERSONNEL SERVICES**
- **PERSONNEL SERVICES**
- **PERSONNEL SERVICES**
- **PERSONNEL SERVICES**
The Position Control Job Class List (POSR070) is a control report designed for staff in both Position Control and Personnel. The report provides a listing of position information by position number within Job Classification Title. The report separates Job classifications by Job Type (certificated, classified, board, etc.). The report shows position status information and lists position incumbents. The report is sent to the district once a month and is available by special request.

Report Organization

The report is organized by Job Classification Titles within Job Types. Within each Job Classification Title, positions are listed by Position Number. Each Job Type begins on a new page.

The report shows: the position number; the Position Control method used to monitor the position with the position allocation; the status of each position; the location; the position's Labor Distribution; and an alphabetical list of employees assigned to the position. Filled, Available, (etc.) FTE counts are provided if the position is monitored by FTE and the position is active. Positions monitored by Hours, Days, or Pay do not show FTE counts. A comment entered on PCDB screen 002 will print on the report.

Report VI-16 shows a listing of classified positions by Job Classification Title. The job classification Accounting Technician lists one active position, 000145, with an allocation of one FTE. The position is assigned to the Accounting Department and is filled by Ana Riggins.
## Departmental Position Allocation List (POSR010)

<table>
<thead>
<tr>
<th>Position</th>
<th>Position Number</th>
<th>Method</th>
<th>FTE</th>
<th>Labor Distributions</th>
<th>Filled</th>
</tr>
</thead>
<tbody>
<tr>
<td>020000-.Dir 11 Secretary</td>
<td>000053</td>
<td>FTE</td>
<td>1.0000</td>
<td>010-115000-30100-00000-2310-0000000-100.00%</td>
<td>1.0000</td>
</tr>
<tr>
<td>269000-Acctng Specialist</td>
<td>000068</td>
<td>FTE</td>
<td>1.0000</td>
<td>030-115000-30100-00001-2420-1524000-100.00%</td>
<td>1.0000</td>
</tr>
<tr>
<td>559000-Sr Div Secy</td>
<td>000035</td>
<td>FTE</td>
<td>1.0000</td>
<td>030-115000-42100-20000-2820-2524111-100.00%</td>
<td>1.0000</td>
</tr>
<tr>
<td>559000-Sr Typist Clk</td>
<td>000059</td>
<td>FTE</td>
<td>1.0000</td>
<td>010-114000-23100-00000-2320-0000000-100.00%</td>
<td>1.0000</td>
</tr>
</tbody>
</table>

**Active FTE Positions**: 4

**Filled**: 3

**Resvd (LV)**: 1

**Vacant**: 1
The Departmental Position Allocation List (POSR010) is a control report designed to be distributed to department administrators as well as used by staff in both Position Control and Personnel. The report provides a listing of positions allocated to each department (Work Location) and shows the allocations by Job Classification Titles separated by Job Types (certificated, classified, board, etc.). The report shows position status information and lists position incumbents. The report is sent to the district once a month and is available by special request.

**Report Organization**

The report is organized by Job Types (certificated, classified, board, etc.) within Work Location Titles. Job Classification Titles are listed alphabetically under each Job Type and positions are listed by Position Number within each Job Classification Title. The Work Location Title and Job Type show at the top of each page and a change in Work Location Title or Job Type will begin on a new page.

The report shows: the position number; the control method used to monitor the position with the position allocation; the status of each position; the position's labor distribution; and an alphabetical list of employees assigned to the position. Filled, Available, (etc.) FTE counts are provided if the position is monitored by FTE and the position is active. Hold, Frozen, Inactive, Closing and Closed positions do not show FTE counts. Positions monitored by Hours, Days or Pay do not show FTE counts. A comment entered on PCDB screen 002 will print on the report.

*Report VI-18 shows a listing of Classified positions assigned to the Auditing Office. The positions are listed by Job Classification title. The job classification Secretary lists one position, 000053, with an allocation of one FTE. The active position has a labor account "010-115000-30100-00000-2310-000000-100.000%" and is filled by Emma Thurston.*
### Report Description

**REPORT:** POSR050 - Position Requisition List  
**DISTRIBUTION:** District - 1 Copy  
**FREQUENCY:** Upon request  
**RETENTION:** Keep current only  
**USE:** To keep track of Position Requisitions by departments/sites

### Department Position Requisition List (POSR050)

<table>
<thead>
<tr>
<th>REQUISITION: 97000003</th>
<th>POSITION NO: 010022</th>
<th>STATUS: A</th>
<th>DATE FILED: 07/01/01</th>
<th>FTE/DOLLAR: 1.0000</th>
</tr>
</thead>
<tbody>
<tr>
<td>REQUESTED NAME: SUSAN DORSEY</td>
<td>REQUISITION COUNT: 1</td>
<td>REQUISITION FTE: 1.0000</td>
<td>REQUISITION DOLLARS: 1.0000</td>
<td></td>
</tr>
<tr>
<td><strong>JOB CLASS TOTALS</strong></td>
<td>1</td>
<td>1.0000</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>JOB TYPE TOTALS</strong></td>
<td>1</td>
<td>1.0000</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WORK LOCATION TOTALS</strong></td>
<td>1</td>
<td>1.0000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>REQUISITION: 97000001</th>
<th>POSITION NO: 000005</th>
<th>STATUS: A</th>
<th>DATE FILED: 05/01/93</th>
<th>FTE/DOLLAR: 1.0000</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMMENTS: FILL TO END OF SCHOOL YEAR</td>
<td>REQUISITION COUNT: 1</td>
<td>REQUISITION FTE: 1.0000</td>
<td>REQUISITION DOLLARS: 1.0000</td>
<td></td>
</tr>
<tr>
<td><strong>JOB CLASS TOTALS</strong></td>
<td>1</td>
<td>1.0000</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>JOB TYPE TOTALS</strong></td>
<td>1</td>
<td>1.0000</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>WORK LOCATION TOTALS</strong></td>
<td>1</td>
<td>1.0000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Departmental Requisition List (POSR050) is a control report designed to be distributed to department administrators as well as used by staff in both Position Control and Personnel. The report provides a listing of position requisitions allocated to each department (Work Location) and shows the allocations by Job Classification Titles separated by Job Types (certificated, classified, board, etc.). The report shows position requisition information. The report is available by special request.

**Report Organization**

The report is organized by Job Types (certificated, classified, Board, etc.) within Work Location Titles. Job Classification Titles are listed alphabetically under each Job Type and requisitions are listed by Requisition Number within each Job Classification Title. The Work Location Title shows at the top of each page and a change in Work Location Title will begin on a new page.

The report shows: the requisition number; the status of each requisition; the FTE allocation for the requisition; and, if entered, the name of a person requested to fill the position with a start and stop date for the assignment. A comment entered on PCDB screen 006 will print on the report. The report shows Requisition FTE Summary counts for Job Classifications, Job Types, and the Work Location.

*Report VI-20 shows two requisitions for the Human Resource Services. The requisitions are listed alphabetically by Job Title. The classification "ADMIN AIDE" has one requisition. Requisition 96000003 is for position 010022 with an FTE allocation of 1.0000. Susan Dorsey is being requested to fill the position beginning 08/01/01. She is only going to fill the position on an acting basis to 12/31/01. The comment explains that she will be filling the position until the end of the school year.*
### Account Code Override List Report (POSR085)

**Report Description**
- **REPORT:** POSR085 - Account Code Override List Report
- **DISTRIBUTION:** District - 1 Copy
- **FREQUENCY:** Monthly and upon request
- **RETENTION:** Keep current only
- **USE:** To identify and correct the Labor Distribution discrepancies between EDB and PCDB

<table>
<thead>
<tr>
<th>POSN #</th>
<th>EMPLOYEE NAME</th>
<th>JOB</th>
<th>JOB TITLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>160443</td>
<td>AARON, BRENT</td>
<td>3</td>
<td>TEACHER</td>
</tr>
<tr>
<td></td>
<td>XXX-XX-7773</td>
<td></td>
<td></td>
</tr>
<tr>
<td>171817</td>
<td>AARON, JOHN</td>
<td>3</td>
<td>PARAEDUCATOR</td>
</tr>
<tr>
<td></td>
<td>XXX-XX-1117</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20045</td>
<td>ANDERSON, MARIA</td>
<td>7</td>
<td>PSYCHOLOGIST</td>
</tr>
<tr>
<td></td>
<td>XXX-XX-3338</td>
<td></td>
<td></td>
</tr>
<tr>
<td>343003</td>
<td>BEEL, FERNAND</td>
<td>6</td>
<td>DEVELOPER</td>
</tr>
<tr>
<td></td>
<td>XXX-XX-8669</td>
<td></td>
<td></td>
</tr>
<tr>
<td>343004</td>
<td>CAMPOS, ANGELO</td>
<td>3</td>
<td>DEVELOPER</td>
</tr>
<tr>
<td></td>
<td>XXX-XX-4448</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
The Account Override List Report (POSR085) is a control report designed to list Account Overrides between PCDB screen 003 and EDB screen 006. The labor distribution information is automatically updated from Position Control when an assignment is filled. When the labor distribution is changed on the PCDB screen 003, this change also updates screen 006 on the EDB. Proper security clearance is required to override labor on EDB screen 006.

Before making any corrections, labor distributions must be reviewed to determine which area has the correct information the EDB or PCDB. Then the change can be made accordingly.

NOTE: Make labor account updates during the WINDOW PERIOD, when no time reports are outstanding, so that there is no discrepancy between the labor distribution reflected on the time reports and EDB screen 006. Payroll can override labor distribution on the time file.

A labor distribution can be changed on the EDB screen 006, however the system will consider this change on the EDB as an override. The EDB screen 006 will display an on-line message, "LABOR DISTRIBUTION IS OVERRIDDEN" Such conditions can be cleared by spacing out the labor on EDB screen 006 with action code "18". EDB screen 006 will automatically be populated by the labor on PCDB screen 003.

Report organization

The report is organized by the Position Number, Employee Name, Job, Job Title, Position Control Account Distribution, and EDB Account Distribution. Report VI-22 shows five positions. The Positions are listed by position number, the Incumbents, and the account distribution that Positions are charged to. The district needs to investigate the account discrepancies and make changes accordingly.
(Intentionally left blank)
POSITION CONTROL DATABASE

Run Specifications
Screen VII-3 displays the Function 15 Menu, Run Specification Maintenance. The items listed on this menu are to execute batch activities. Position Control has five options supported on the Function 15 menu:

028 POS Control Report Requests
029 Year End Processing Request
030 POS CNTRL Mass Change - SEL
031 POS CNTRL Mass Change - CHG
032 POS CNTRL Build

Transaction 028 produces district reports. Transaction 029 is for LACOE to perform the fiscal year-end computer file procedures to create the next fiscal year positions. Transactions 030 - 031 are for LACOE to do the Mass Change and 032 to Build/Create a new district on PCDB.
Position Control Report Requests Screen (028) can be accessed through Position Control Menu Function 10-transaction 028 or Function 15-transaction 028. The screen 028 allows a user to select one or all of the following reports listed on the screen by typing in the appropriate letter and pressing the transmit key.

- Position listing by Work Location with Incumbents (POSR010)
- Position listing by Position Number with Incumbents (POSR020)
- Requisition listing by Work Location (POSR050)
- Position listing by Job Class with Incumbents (POSR070)
- Position listing by Labor Distribution Account with Incumbents (POSR080)
- Position listing by Accounts Override with Incumbents (POSR085)

Each report may be requested for either the current or the next fiscal year. The report is executed by entering the district number and pressing transmit. The computer programs that will produce the report will begin immediately. See PCDB Reports Section VI-7.

Screen VII-4 shows a request to produce all the reports listed on the screen for district "001" using the current fiscal year data.
Field Descriptions

1 \^ SELECT REPORT  
Select the Position Control Report to be printed by typing in the appropriate letter code:

W = Position Allocation List.  
P = Positions List by Position number.  
R = Requisition List by Work Location  
C = Position List by Job Class  
A = Position List by Account Number  
O = Position List by Account Override

2 \^ SELECT A FISCAL YEAR  
Selects Fiscal Year to be printed:

C = Current Fiscal Year  
N = Next Fiscal Year

3 \^ SELECT DISTRICT  
District number. LACOE may enter "ALL" to execute the same type of report for all districts.

4 \^ SELECT NUMBER OF COPIES  
Type in the number of copies requested 1 or 2

\^ Required field
The Year End Processing Request Screen (029) allows LACOE staff to execute the "Copy" and "Roll" procedures that create the Position Control file for the next fiscal year. See PCDB Year End Transition, PC 1-10.

*Screen VII-6 shows a request to execute the "Copy" step for district "001".*

**Field Descriptions**

1. **COPY**
   - Enter "X" to execute the "Copy" procedures.

2. **ROLL**
   - Enter "X" to execute the "Roll" procedures.

3. **DISTRICT**
   - Enter a district number to select a specific district or "ALL" to execute the procedures for any districts that have not been previously copied or rolled.

~  = "X" must be entered in either Copy or Roll

^  = Required field
POSITION CONTROL DATABASE

Screen Reference List
(Intentionally left blank)
## Section II. CDB Information

<table>
<thead>
<tr>
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<th>Function/Screen No.</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
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<td>District Profile Table 1</td>
<td>II-3</td>
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<tr>
<td>CDB</td>
<td>11 / 028</td>
<td>District Codes Table - Sub-table PC</td>
<td>II-4</td>
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<tr>
<td>CDB</td>
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<td>District Codes Table - Sub-table PN</td>
<td>II-6</td>
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<tr>
<td>CDB</td>
<td>11 / 040</td>
<td>Speed Key / Account Code Linkup Table</td>
<td>II-8</td>
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<tr>
<td>CDB</td>
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<td>Table Search – Account Code Speed Key Table</td>
<td>II-10</td>
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</tbody>
</table>

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<tr>
<th>Module</th>
<th>Function/Screen No.</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
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<td>10 / 000</td>
<td>Position Control Menu</td>
<td>III-3</td>
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<td>10 / 002</td>
<td>Basic Position Information</td>
<td>III-9</td>
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<tr>
<td>PCDB</td>
<td>10 / 003</td>
<td>Labor Distribution Information</td>
<td>III-17</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 006</td>
<td>Corresponding Labor Distribution EDB</td>
<td>III-17</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 004</td>
<td>Financial Information</td>
<td>III-23</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 005</td>
<td>Position Skills Information</td>
<td>III-30</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 006</td>
<td>Requisition Information</td>
<td>III-34</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 019</td>
<td>Incumbent Summary Information</td>
<td>III-38</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 018</td>
<td>Incumbent Information</td>
<td>III-42</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 020</td>
<td>Vacant Position Search – All Vacant Positions</td>
<td>III-46</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 020</td>
<td>Vacant Position Search by Account Code</td>
<td>III-47</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 020</td>
<td>Vacant Position Search by Job Class &amp; Work Location</td>
<td>III-47</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 020</td>
<td>Vacant Position Search by Job Class</td>
<td>III-48</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 020</td>
<td>Vacant Position Search by Work Location</td>
<td>III-48</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 097</td>
<td>County Name Search – Primary Job</td>
<td>III-51</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 098</td>
<td>District Name Search – All Active Assignments</td>
<td>III-52</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 099</td>
<td>District Name Search – Active &amp; Terminated Assignments</td>
<td>III-53</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Module</th>
<th>Function/Screen No.</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
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<td>Option “2” – EDB – Warning Message</td>
<td>IV-4</td>
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<tr>
<td>EDB</td>
<td>01 / 005</td>
<td>Option “2” – EDB – Warning Message</td>
<td>IV-5</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 004</td>
<td>Option “3” – EDB – Fatal Error Message</td>
<td>IV-6</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 005</td>
<td>Option “3” – EDB – Fatal Error Message</td>
<td>IV-7</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 006</td>
<td>EDB – Labor Distribution Override Message</td>
<td>IV-8</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 006</td>
<td>EDB – Missing PCDB Labor Distribution Message</td>
<td>IV-9</td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Module</th>
<th>Function/Screen No.</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>PCDB</td>
<td>10 / 002</td>
<td>Position Status Counting</td>
<td>V-4</td>
</tr>
<tr>
<td>EDB</td>
<td>04 / 005</td>
<td>Filled Position – 1.000 FTE</td>
<td>V-5</td>
</tr>
<tr>
<td>EDB</td>
<td>04 / 005</td>
<td>Filled Position – 0.500 FTE</td>
<td>V-5</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 006</td>
<td>Requisition – 0.500 FTE</td>
<td>V-6</td>
</tr>
<tr>
<td>PCDB</td>
<td>10/002</td>
<td>Vacancy Requisitioned – 0.500</td>
<td>V-6</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 004</td>
<td>Terminated Job Is Not In PC Status</td>
<td>V-7</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 004</td>
<td>Acting Assignment “A”</td>
<td>V-8</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 002</td>
<td>Acting Count</td>
<td>V-9</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 004</td>
<td>Unpaid Leave</td>
<td>V-10</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 002</td>
<td>Reserved Count</td>
<td>V-11</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 004</td>
<td>Reserved On Unpaid Leave</td>
<td>V-12</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 004</td>
<td>Acting</td>
<td>V-13</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 002</td>
<td>Active / Reserved Count</td>
<td>V-14</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 002</td>
<td>Future Active Date</td>
<td>V-17</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 002</td>
<td>Future Close Date</td>
<td>V-17</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 002</td>
<td>Enter “D” to Delete Position – Step 1</td>
<td>V-21</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 002</td>
<td>Enter “*” to Confirm the Delete – Step 2</td>
<td>V-21</td>
</tr>
<tr>
<td>PCDB</td>
<td>10 / 002</td>
<td>Partial FTE – 1.0 FTE</td>
<td>V-24</td>
</tr>
<tr>
<td>EDB</td>
<td>01 / 005</td>
<td>Share Position “876431” – 1.5 FTE – Employee 1</td>
<td>V-25</td>
</tr>
<tr>
<td>EDB</td>
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