

Managing Position Data Overview

Positions are required and tracked, whether they are vacant or filled. Agencies will continue to utilize agency-specific systems or paper forms outside of Cardinal to capture position information and route for approvals (e.g., agency budget, HR approvals) within the agency. The position number is unique for each agency and begins with the Cardinal three-digit Company code that represents the Agency. The position number is needed before adding or cloning a position.

Positions are created before an employee is hired. Once hired, an employee is associated to the position for which they were hired, and additional job data information is completed. The job data information inherits the position data that is selected at the time of adding a new hire or when moving an employee into a new position. Details or information regarding the position are first changed at the position level and are then conveyed to the associated employee’s job data record.

Positions are created for all employees. Cardinal position management supports Human Resources, Benefits, Time and Attendance, and Payroll. COVA uses positions to track the details of a specific job in a department or location that typically has a one-to-one relationship with employees. On occasion, dual incumbency is allowed when someone is retiring, and their replacement is hired before the retirement date to be trained. The position Head Count must be temporarily increased in this instance. Data is attached to the positions, and employees move in and out of those positions. If a Pay reduction is required, make sure it is in accordance with DHRM Policy 1.60 and 3.05 and use Position action of POS/DIP.

If a new Job Code is required, work with DHRM to add the required Job Code prior to entering the new position. If a Job Code is changed on a position that affects an incumbent, it may be necessary to then enter the related compensation change on the incumbent’s job record.

If position level funding is utilized, review the ChartField distribution when changing position attributes using the job aid titled, **HR351_Position ChartField Assignment and Update**. This job aid can be found on the Cardinal Website in **Job Aids** under **Learning**. This data is exclusively maintained by employees with security access to the Department Budget Table.

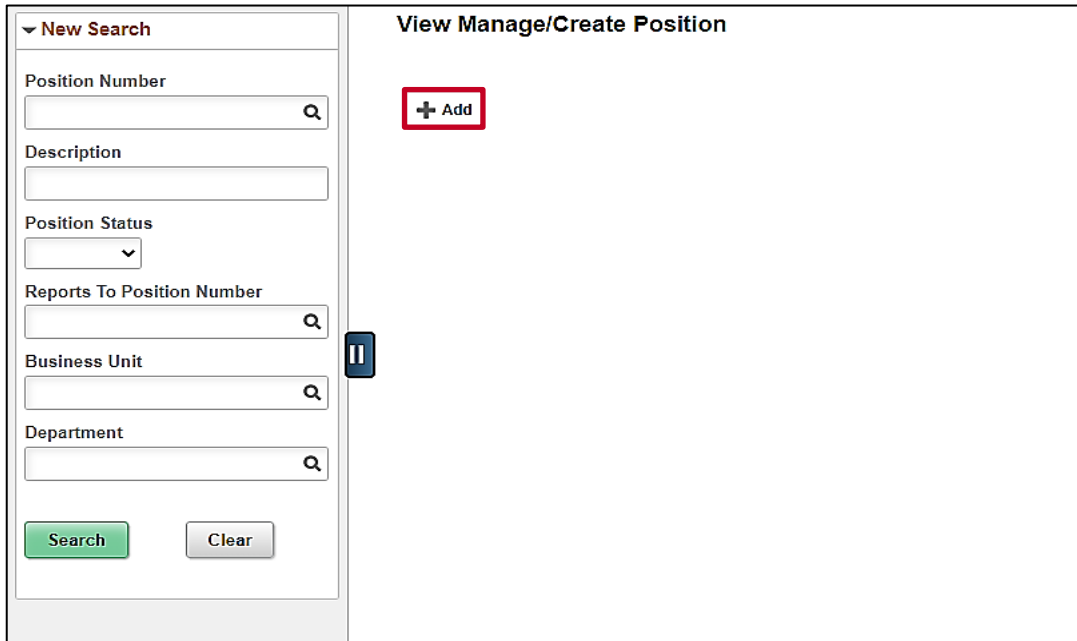
Navigation Note: Please note that you may see a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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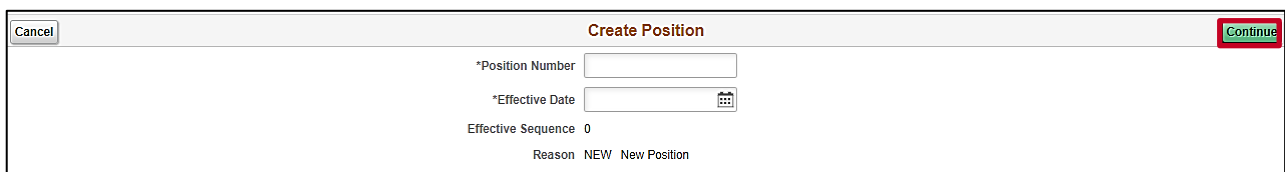
Creating a Position

- To create a new position, navigate to the **Manage/Create Position** page using the following path:
Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position



- Click the **Add** button.

The **Create Position** page displays.



- Enter the applicable Position Number in the **Position Number** field.
- The **Effective Date** field must be updated to the applicable effective date for the new position as needed using the **Calendar** icon and must be:
 - Greater than or equal to the effective date of the position's **Job Code** (which is maintained by DHRM)
 AND
 - Less than or equal to the effective date of any employee job transaction(s).

Note: For further information on effective dating, refer to the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.
- Click the **Continue** button.



The **Create Position** page displays with the **Position Data** Step 1 of 4 displayed by default.

Note: Various field can be (or must be) entered on the **Position Data** Step 1 of 4: of the **Create Position** page. It is important to review all of the fields on each step (in order) as some fields are dependent on others.

Position Data Header Fields:

Field	Required	Value	Description	Comments
Effective Date	Y	Date	Effective dates are used to store historical, current, and future information for the position	Read-only. Defaults from previous entry
Effective Sequence	Y	Incremental Number	Effective sequence tracks the sequence of changes in rows with the same effective date for transactional history	Read-only. Systematically assigned as applicable
Reason Code	Y	Code	Action Reason Code used to describe the type of changes being made to the position	Read-only. Defaults from previous selection on the Request Details page. Defaults to NEW when creating or cloning a position



Human Resources Job Aid

HR351_Managing Position Data

Field	Required	Value	Description	Comments
Review Date	N	Date	Next date the position is to be reviewed due to prevailing circumstances at the time of establishment (e.g., funding from sources of an indeterminate duration)	Optionally enter/select a review date for the position. This field replaces the position end date from PMIS
Position Months	Y	Numeric	Number of Months per Year that the position will be filled	Enter the number of Months per Year that the position will be filled
Stmnt of Economic Interest (SOEI) Reqd	Y	Yes/No	Y = Yes: Statement of Economic Interest is required N = No: Statement of Economic Interest not required	Defaults to "No". Update as needed
VPA Covered	N	Yes/No	This field will indicate if the position is covered by the Virginia Personnel Act (VPA). For all classified positions, this must be Y. For all other positions this must be N. Incorrect data will result in inaccurate report results	Defaults to "No". Update as needed



Position Information section screenshot:

Position Information fields:

Field	Required	Value	Description	Comments
Position Status	Y	Approved Frozen Proposed	Current status of the position	Defaults to "Approved". Update as needed. Frozen positions continue to populate and count towards strength reports. Proposed is not used in Cardinal
Max Head Count	Y	Numeric	The number of employees that can be assigned to the position (positions normally have a one-to-one relationship with employees) unless the position permits job sharing or can be assigned to multiple incumbents	Defaults to "1". Update to the applicable count if the position permits job sharing or will be assigned to multiple incumbents (i.e., dual incumbency or Pooled Positions)
Status	Y	Active/Inactive	Current status of "Active" or "Inactive" for the position	Defaults to "Active". Inactive positions do not populate to strength reports. Positions cannot be abolished in Cardinal, use Inactive instead



Human Resources Job Aid

HR351_Managing Position Data

Field	Required	Value	Description	Comments
Status Date	N	Date	Date that the current status was applied to the position	Defaults to the current system date. Update as needed
Action Date	N	Date	Provides the date for the update action	Defaults to the current system date. Do not change
Alternate Work Schedule	N	Yes/No	Designates whether the employee is actively working an Alternate Work Schedule. This field must be set to "Y" before the Employee Alternate Work Schedule field can be set to "Y" on the Job record	Defaults to "No". Update as needed
SOC Code/Extension	Y	Numeric (ignore punctuation) Ex: 11-1021.125 SOC code is 111021125	Used to identify the Federal Standard Occupational Classification (SOC) code For more information, see job aid titled, HR351_Overview of SOC and Job Code Combinations	This field is required for Classified and Agency Head Employees. It is Optional for all other employee types.
Key Position	N	Yes/No	Indicates whether the position is a key position	COVA is not currently using this field
Budgeted Position	Y	Yes/No	Indicates whether the position is part of the agency budget	Defaults to "Yes". Update as needed
Job Sharing Permitted	N	Yes/No	Indicates whether job sharing is permitted for the position	Defaults to "No". Update as needed



Field	Required	Value	Description	Comments
Confidential Position	N	Yes/No	Indicates whether the position is a confidential position. (e. g. Undercover officers)	Defaults to "No". Update as needed. If confidential position is checked, the position nor incumbents will be reported out in the Active directory or employee directory extracts
Available for Telework	N	Yes/No	Indicates whether the position is available for telework	Defaults to "No". Update as needed
EEO-4 Job Category	Y	1 = Officials and Administrators 2 = Professional 3 = Technicians 4 = Protective Service 5 = Paraprofessional 6 = Office/Clerical 7 = Skilled Craft 8 = Service Maintenance N = No EEO-4 Reporting The default value for all job codes will be N if agency does not override the value.	Equal Employment Opportunity Occupational Code (EEO). Federal code associated with this position. Code identifies the primary occupational activity of the employee	Select the appropriate EEO-4 Job Category
Worker's Comp Code	Y	Code	The Workers' Compensation hazard code identifies the type of work being	The codes are on the DHRM Worker Comp website



Field	Required	Value	Description	Comments
			performed for the purpose of determining the agency's WC premium and claims experience modification factor.	

Job Information section screenshot:

Job Information

*Business Unit: 15100 Department of Accounts *Full/Part Time: Full-Time

*Job Code: Union Code:

*Regular/Temporary: Short Title:

*Regular Shift: Not Applicable Description:

*Title:

Job Information fields:

Field	Required	Value	Description	Comments
Business Unit	Y	5-Digit Numeric Code	Indicates the Business Unit associated with the position. The Business Unit drives the first three alpha-characters of the Position Number	Defaults to the user's business unit and can only be updated if the user has access to multiple Business Units. Currently the Agency number (3 digits with two 00s added at the end)
Job Code	Y	5-Digit Numeric Code and associated Job Title	Indicates the unique code and title associated with a specific job For more information regarding Agency Heads and Classified	All Wage Job Codes must begin with a W. Only Classified Job Codes are to be used for VPA covered positions. Do not use Classified Job Codes for non-VPA positions. Prior to updating,



Human Resources Job Aid

HR351_Managing Position Data

Field	Required	Value	Description	Comments
			job codes, see job aid titled, HR351_Overview of SOC and Job Code Combinations	make a note of the current values in the Regular/Temporary, Full/Part Time, and FLSA Status fields as these values may need to be re-applied after updating the Job Code NOTE: This is the title that appears on most reports.
Regular/Temporary	Y	Regular Restricted Temporary	Indicates whether the position is regular, restricted, or temporary	Select the applicable value
Regular Shift	Y	Defaults	This field is not utilized in Cardinal	Defaults to “Not Applicable”. Do not change
Title	Y	Defaults	Provides the Title associated with the Job Code	Update as needed to reflect the working title
Full/Part Time	Y	Full-Time Part-Time Quasi	Indicates whether the position is a full-time, part-time, or quasi position	If changing the position’s Job Code, this field will default to “Full-Time”. If the incumbent is a quasi or part-time employee, verify this field is updated. The Full time/Part time field on Position can and should be adjusted accordingly as used in PMIS today
Union Code	N		This field is not utilized in Cardinal	
Short Title	N	5-Digit Numeric Code	Defaults from the Job Code	Do not update



Field	Required	Value	Description	Comments
Description	N	Defaults	Defaults from Job Code	Update as needed to reflect the working title. The KSA can be populated if desired. This field allows for more than 250 characters

Work Location section screenshot:

Work Location fields:

Field	Required	Value	Description	Comments
Reg Region	Y	Defaults	Indicates the work location region	Defaults to "USA". Do not change as this effects Federal Government reporting
Company	Y	3 digit alpha-numeric code	Defaults from the Business Unit	Same 3 characters used to establish the Position Number
Department	Y	3 - 5 digit numeric code	Indicates the position's department	Select the appropriate Department Note: When changing the department for an existing position that uses position level funding, new funding must be entered for the newly established

Field	Required	Value	Description	Comments
				position/department combination before adding the position level funding.
Location	Y	3-5 digit alpha-numeric code	Indicates the physical work location for the position (where the incumbent sits or works), which impacts whether the salary plan is SW or NV for classified salary grades. Location code also impacts Healthcare Plan eligibility coverage. If telework, consider and designate region of Commonwealth incumbent teleworks	Select the appropriate Location. Location codes will determine COVA salary plans and benefits eligibility.
Reports To	Y	Position Number	Used to establish reporting relationships. Integrates with Cardinal Financial system	Enter the position's report to Position Number. Note: If the Reports To position is temporarily vacant or on a Leave of Absence, approvals will route to the next higher-level Reports To position. This impacts Time and Attendance Approvals
Supervisor Level	Y	1 digit alpha-character code	Indicates the supervisory level for the position (Employee, Faculty, Manager, or Supervisor)	Enter the position's supervisor level
Dot-Line	N	Position Number	Used to indicate that this position has a dotted line reporting relationship to another position	Enter the Position Number to which this position has a dotted line relationship as applicable Does not impact TA Approval
Security Clearance	N	Code	Used to identify the required security	Not utilized in Cardinal



Field	Required	Value	Description	Comments
			clearance for the position holder as applicable	
Supervisor Position	N	Position Number	Provides the Position Number of the employee's daily/operational supervisor	Optionally enter the Position Number This can be different than the Reports To
Appointed Category	N	Governor Appointed Board Appointed Elected Official Legislative Not Applicable	Used to track Appointment Types	Defaults to "N/A". Update as needed



Salary Plan Information section screenshot:

Salary Plan Information fields:

Field	Required	Value	Description	Comments
Salary Admin Plan	Y	2 digit alpha-character code	Defaults from Job Code As designated on Salary Plan table, which correlates with respective Job code. SET ID = STATE derives classified salary plan when respective job code is selected. Alternate Salary Plan requires DHRM approval and designation of Agency specific SET ID	Read-only
Grade	Y	Numeric code	Defaults from Job Code As designated on Salary grade table and correlates with Salary Plan/Job Code. For alternate salary plans with DHRM approved alternate grades, Only DHRM has access to designate a position with an Alternate Grade	Read-only
Standard Hours	Y	Number (in Hours)	Defaults from Job Code	Defaults to 40 hours and should not be changed on the position. This must only be changed on the incumbent's job record for Quasi or PT status



Field	Required	Value	Description	Comments
Step	Y	Numeric code	Defaults from Job Code Alternate salary plan and use of steps require agency specific SET ID. Once alternate set ID is established, (PPS request) Agency will have ability to create steps within the min and max thresholds of the STATE Grade	Update as needed
Work Period	Y	Defaults	Defaults from Job Code	Do not change. Daily hours fields can be viewed if the work period is "Weekly". This does not impact the schedule the employee will work in TA

Note: The **Specific Information** section is not utilized in Cardinal.

USA section screenshot:

USA fields:

Field	Required	Value	Description	Comments
FLSA Status	Y	Defaults	Fair Standards Labor Act (FLSA) Values are "Nonexempt" or "Professional"	This will need to be correct because it will impact PY and TA if using the functionality. It will impact reporting for all Agencies. Professional = Exempt NOTE: If an update is made to the Job Code field, this field will default to "Nonexempt".



Field	Required	Value	Description	Comments
Bargaining Unit	Y	Defaults to "8888"	This field is not utilized in Cardinal	Do not change

6. Click the **Next** button in the top right-hand corner of the **Position Data** page.

The **Create Position** page refreshes with the **Specific Information** Step 2 of 4 displayed.

Note: There are various fields that can be updated on the **Specific Information** step of the Create Position page. Regardless of the specific update required, it is important to review all of the fields on each step (in order) because some of the fields have dependencies on other fields when making updates. The following screenshots and tables provide a brief description of each field (by section) along with other important information regarding whether updates can be made and any dependencies on other fields as applicable.

Specific Information section screenshot:

Note: The **Education and Government** section is not utilized in Cardinal. The **FTE** field in this section should not be used and is not used for EPR reporting.

Specific Information fields:

Field	Required	Value	Description	Comments
Mail Drop ID	N	Mail Drop ID	Used to enter the mail drop ID assigned to this position if applicable	Optionally enter as applicable. Not utilized in Cardinal
Telephone	N	Telephone Number	Used to enter the work phone number assigned	Optionally enter as applicable. Not utilized in Cardinal



Human Resources Job Aid

HR351_Managing Position Data

Field	Required	Value	Description	Comments
			to this position if applicable	
Drug Program	N	Yes/No	Indicates if the position requires drug testing. (for example: CDL driver)	Defaults to "No". Update as needed
Signature Authority	N		Indicates the signature authority assigned to the position if applicable	This field is not utilized in Cardinal
Privatization	N	Yes/No	Indicates if the position was abolished (inactive) because the position/job has been privatized	Defaults to "No". Do not update when creating a new position
Agency Use 1-3	N		Optional free form entry fields that can be used as desired by the agency to capture unique agency needs	Enter the applicable information in these fields as needed. Custom fields that have been built for the Commonwealth
License 1-3	N		Optional fields that can be used by the agency to designate up to three licenses associated with the position	Enter the applicable license information in these fields as needed. Custom fields that have been built for the Commonwealth
Physical Requirements	N	Yes/No	Used to indicate if there are any physical requirements (such as a requirement to lift heavy objects) for the position. It will default to N	Defaults to "No". If updated to "Yes", enter the applicable information into the Comments field. Custom fields that have been built for the Commonwealth
Fingerprinting Required	N	Yes/No	Used to indicate if fingerprinting/background is required for the position	Defaults to "No". Update as needed. Custom fields that have been built for the Commonwealth

Field	Required	Value	Description	Comments
Certifications	N	Yes/No	Used to indicate if there are any certifications required for the position	Defaults to “No”. If updated to “Yes”, enter the applicable information into the Comments field. Custom fields that have been built for the Commonwealth
Safety Sensitive Position	N	Yes/No	Used to indicate whether the position is considered by the agency to be Safety Sensitive. (refer to DHRM policy 2.10 – What is a Sensitive Position)	Defaults to “No”. Update as needed. Custom fields that have been built for the Commonwealth
Language	N	Yes/No	Used to indicate if the position has a specific language requirement (other than English)	Defaults to “No”. If updated to “Yes”, enter the applicable information into the Comments field
Critical/Hard to Hire	N	Yes/No	Used to indicate that the position is critical/hard to fill due to market availability	Defaults to “No”. Update as needed. To be used for exceptional recruitment/retention pay action verifications
Comments	N		Free form field used to capture additional information regarding the position	Not to be used for confidential information

- Click the **Next** button in the top right-hand corner of the page after all required reviews and updates are completed for the **Specific Information** page.

The **Create Position** page displays with the **Budget Incumbents** Step 3 of 4 displayed.



Position Number DOCHR099
 Headcount Status Open
 Current Head Count 0

1 Position Data
Visited

2 Specific Information
Visited

3 Budget Incumbents
Visited

4 Review and Submit
Not Started

Step 3 of 4: Budget Incumbents

Effective Date 12/02/2020 Reason Code NEW New Position

Effective Sequence 0 Approval Status Not Available

Current Budget

Head Count 0 Amount 0.000

Current Budget FTE 0.00

Incumbents

Update Incumbents Yes No

Include Salary Plan/Grade Yes No

Force Update for Title Changes Yes No

Current Incumbents

No Incumbents to display.

Note: Although most fields and data on the **Budget Incumbents** step of the **Create Position** page are read-only, it is still important to review every field. The following screenshot and table provide a brief description of each field along with other important information regarding whether updates can be made.

Budget Incumbents sections screenshot:

Current Budget

Earnings 0.000	Cdn Tax 0.000
Deductions 0.000	Total 0.00
Tax 0.000	

Incumbents

Update Incumbents Yes No

Include Salary Plan/Grade Yes No

Force Update for Title Changes Yes No

Current Incumbents

1 row

Name	Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
HREE4 01HR0101	00900005400	0	Full-Time	40.00	05/07/2020	Rehire	Rehire	N	Job Data

Budget Incumbents fields:

Field	Required	Value	Description	Comments
Current Budget fields			Displays the current budget information for the position	Read-only
Update Incumbents	Y	Yes/No	Indicates whether the incumbents can be updated for the position	Read-only. Defaults to "Yes"
Include Salary Plan/Grade	Y	Yes/No	Indicates whether to include a Salary Plan/Grade for the position	Read-only. Defaults to "Yes"



Field	Required	Value	Description	Comments
Force Update for Title Changes	Y	Yes/No		Not utilized in Cardinal
Current Incumbents			List the current incumbent (employee) linked to the position	Click the Job Data link on the right side of the incumbent data line to go to the current incumbent job data

- Click the **Next** button in the top right-hand corner of the page after all required reviews and updates are completed for the **Budget Incumbents** page.

The **Create Position** page displays with the **Review and Submit** Step 4 of 4 displayed.

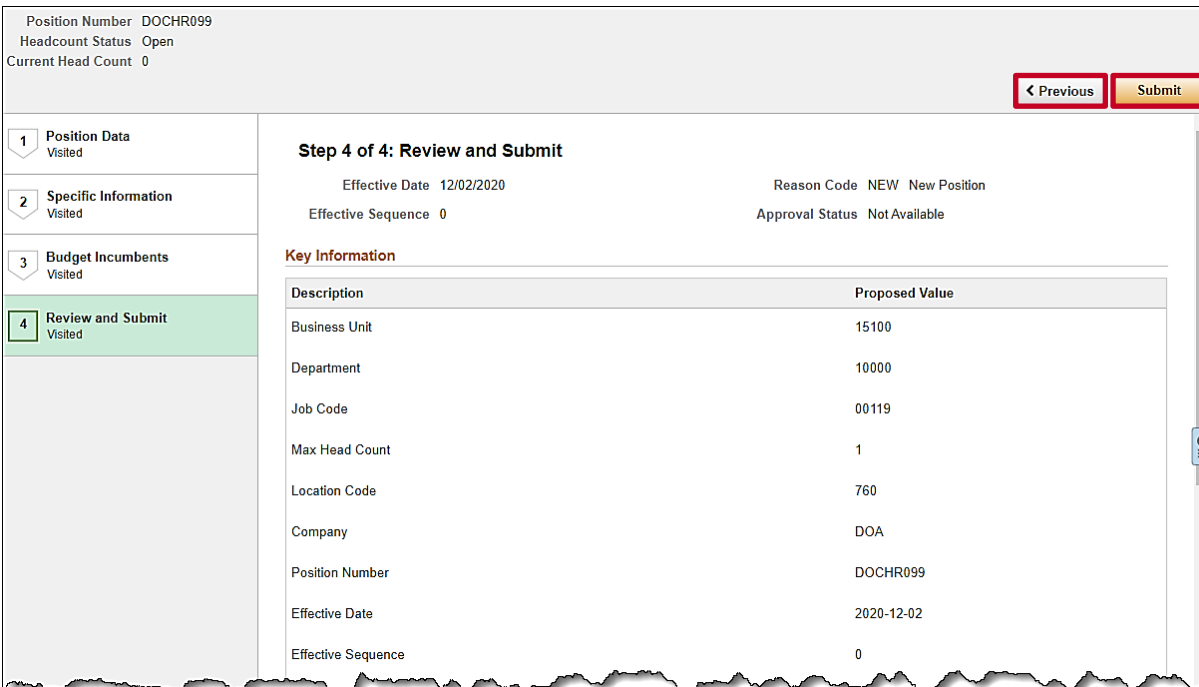


Position Number DOCHR073
Headcount Status Open
Current Head Count 0

Step 4 of 4: Review and Submit

Effective Date 07/30/2020
Effective Sequence 0
Reason Code NEW
Approval Status Not Available

Summary Of Changes



Position Number DOCHR099
Headcount Status Open
Current Head Count 0

Step 4 of 4: Review and Submit

Effective Date 12/02/2020
Effective Sequence 0
Reason Code NEW New Position
Approval Status Not Available

Key Information

Description	Proposed Value
Business Unit	15100
Department	10000
Job Code	00119
Max Head Count	1
Location Code	760
Company	DOA
Position Number	DOCHR099
Effective Date	2020-12-02
Effective Sequence	0

- Review the **Summary of Changes** section (**New Value** and **Old Value** column entries for field updated).

Note: This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking submit.

- If additional information is required, click the **Previous** button to navigate back to the applicable step(s).
- Click the **Submit** button if all updates are accurate.

The **Position Confirmation** page displays.

✓ The New Position Number DOCHR099 has been successfully created.	
Position Number	DOCHR099
Headcount Status	Open
Current Head Count	0 of 1
<input type="button" value="Go to Position Details"/> <input type="button" value="Go to Manage/Create Position"/>	

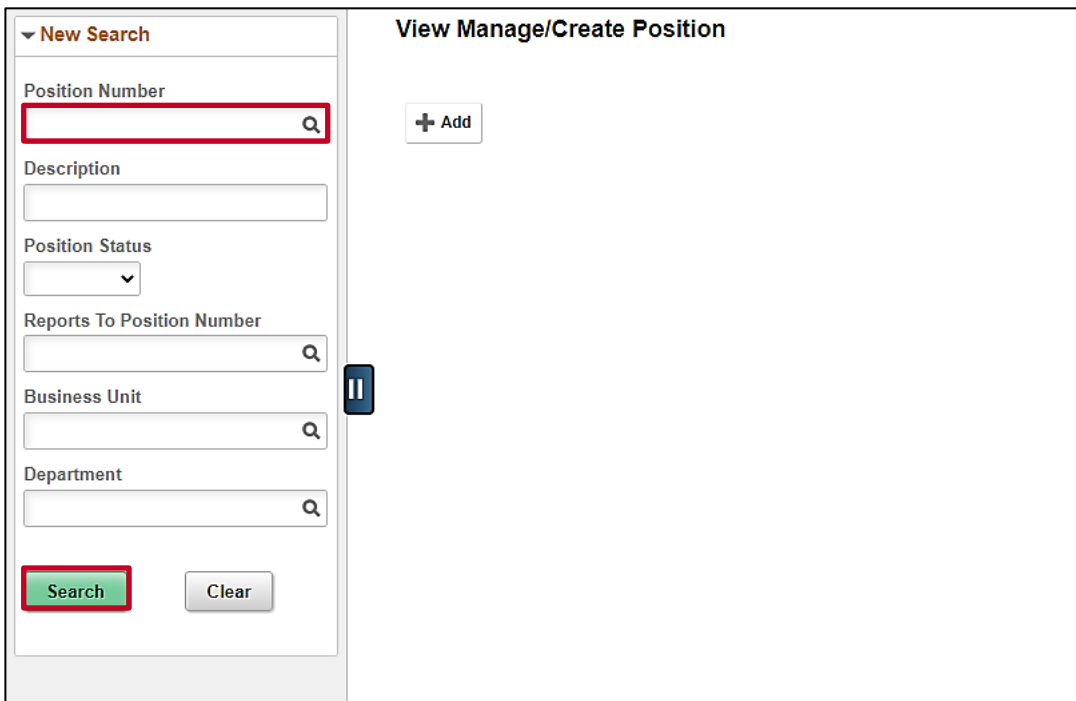
Note: Click the **Go to Position Details** button to return and view the updated information for the position or click the **Go to Manage/Create Position** button to create another position or search for another position and make changes.

Note: When creating a new position, the Position/Department funding may need to be assigned. For more information on assigning or updating position or department funding, see the Job Aid titled **HR351_Position Chartfield Assignment/Update**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

Cloning a Position

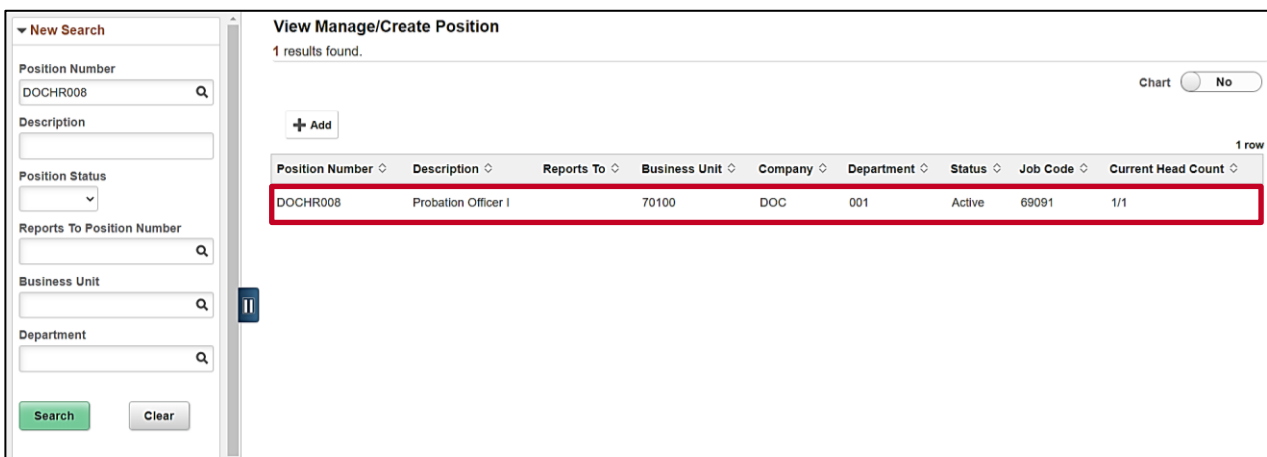
1. To clone an existing position, navigate to the **Manage Position** page using the following path:
Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position

The **Manage/Create Position Search** page displays.



2. Enter the Position Number for the position to be cloned in the **Position Number** field.
3. Click the **Search** button.

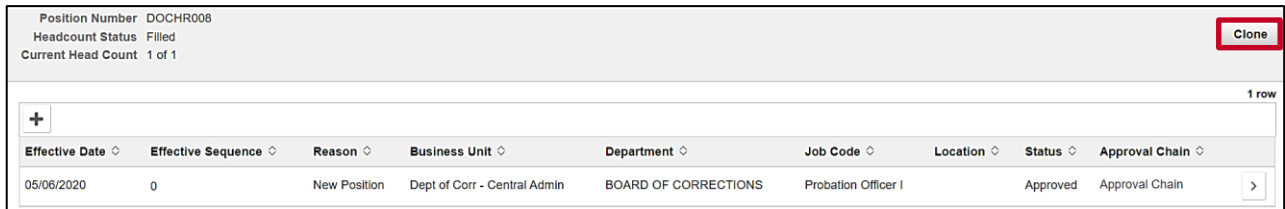
The **Manage/Create Position Search** page refreshes with the search results displayed.



Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
DOCHR008	Probation Officer I		70100	DOC	001	Active	69091	1/1

4. Select the applicable position by clicking anywhere in the corresponding row.

The **Position Details** page displays.



Position Number DOCHR008
Headcount Status Filled
Current Head Count 1 of 1

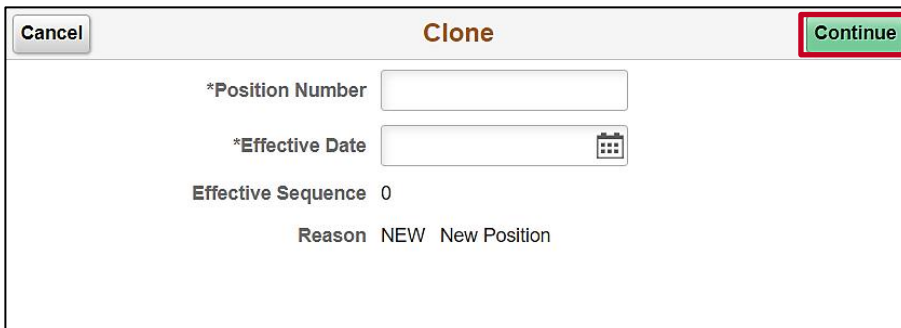
Clone

1 row

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
05/06/2020	0	New Position	Dept of Corr - Central Admin	BOARD OF CORRECTIONS	Probation Officer I		Approved	Approval Chain


5. Click the **Clone** button.

The **Clone** page displays in a pop-up window.



Cancel **Clone** Continue

*Position Number

*Effective Date 

Effective Sequence 0

Reason NEW New Position

6. Enter the new Position Number in the **Position Number** field.

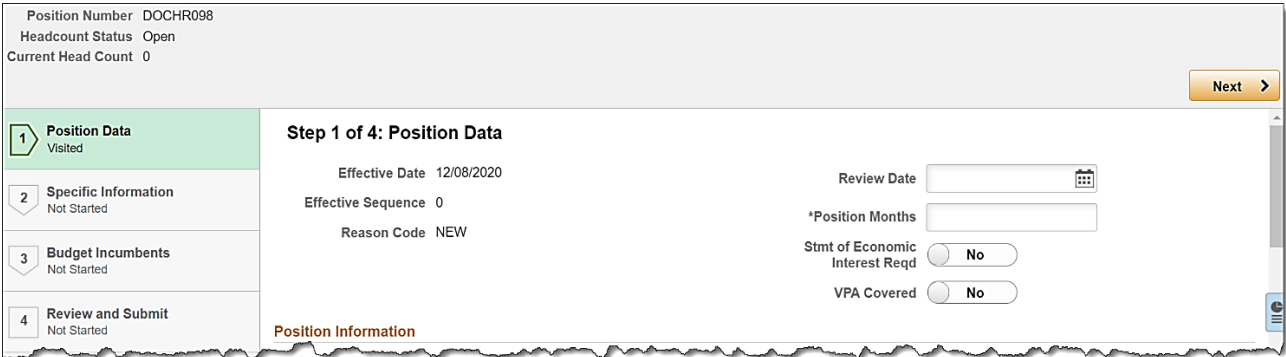
The **Effective Date** field must be updated to the applicable effective date for the new position as needed using the **Calendar** icon and must be:

- Greater than or equal to the effective date of the position's **Job Code** (which is maintained by DHRM)
AND
- Less than or equal to the effective date of any employee job transaction(s).

Note: For further information on effective dating, refer to the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.

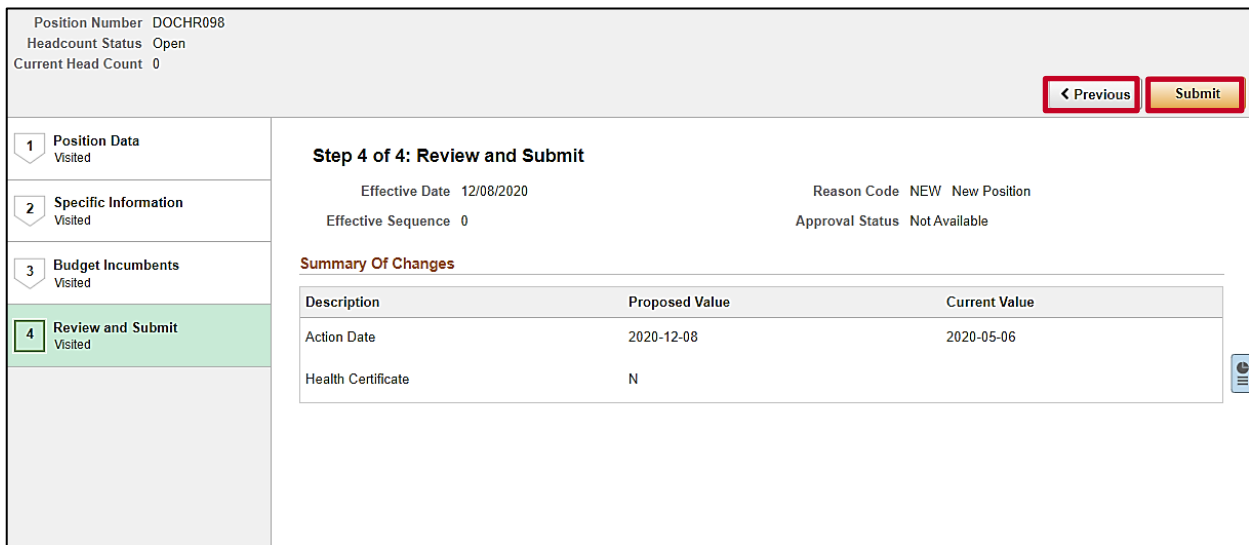
7. Click the **Continue** button.

The **Clone Position** page displays with the **Position Data** Step 1 of 4 displayed by default.



8. The information for the position defaults based on the position from which it was cloned. Review all information and make necessary updates. Submit the new position after all information is reviewed and necessary updates are completed on the various position pages.
9. Click the following link to navigate to the screenshots and tables found in the Manage Position section of this Job Aid, which provide a brief description, important information, and dependencies (as applicable) for each field [Position Data Header Fields](#)

After reviewing the new position's information, the **Create Position** page displays with the **Review and Submit** Step 4 of 4 displayed.



Description	Proposed Value	Current Value
Action Date	2020-12-08	2020-05-06
Health Certificate	N	

12. Review **Summary of Changes** section (**Proposed Value** and **Current Value** column entries for field updated).

Note: This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking submit.
13. If additional information is required, click the **Previous** button and navigate back to the applicable step(s).
14. Click the **Submit** button after verifying all information.

The **Position Confirmation** page displays.

✔ The New Position Number DOCHR098 has been successfully created.	
Position Number	DOCHR098
Headcount Status	Open
Current Head Count	0 of 1
<input type="button" value="Go to Position Details"/> <input type="button" value="Go to Manage/Create Position"/>	



Note: Click the **Go to Position Details** button to return and view the updated information for the position or click the **Go to Manage/Create Position** button to create another position or search for another position and make changes.

Note: When cloning a new position, Position/Department funding may need to be assigned. For more information on assigning or updating position or department funding, see the Job Aid titled **HR351_Position Chartfield Assignment/Update**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

Updating Position Data When an Incumbent Exists

Before making position changes, check the employee’s job data to determine the date of the top row. The effective date of the position change must be after the highest dated job data row for the change to properly flow over to the employee’s job data. In the image below, the top row will flow to the employee’s job without requiring a help desk ticket. The second row requires a help desk ticket to be submitted to make the change.

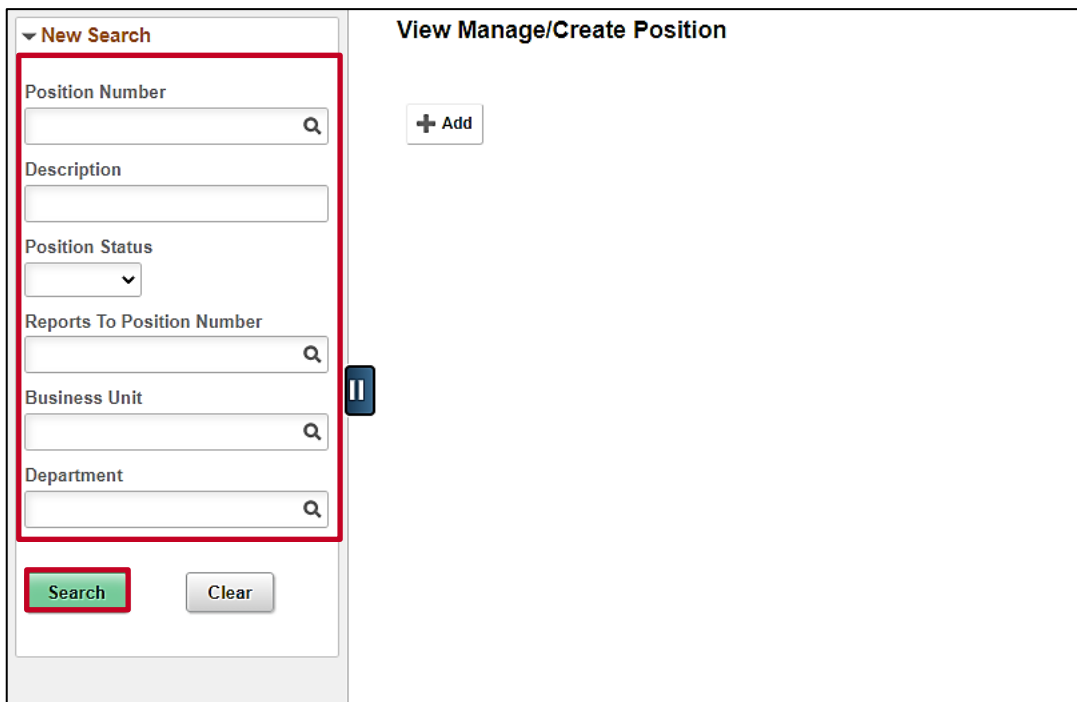
Position Data changes automatically carry over to Job Data of the current incumbent as long as the Position change Effective Date is greater than (after) the current Job Data row.

Position Data Change Date		Top Job Data Row	
Ex: 01/15/2023		Ex: 01/10/2023	
Ex: 01/15/2023		Ex: 02/05/2023	Requires Help Desk Ticket

Note: Position changes that occur before the current effective dated row on Job Data, require a Help Desk ticket.

- To review the effective date of an employee’s highest job data row, navigate to the **Manage Position** page using the following path:
Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position

The **Manage/Create Position Search** page displays.



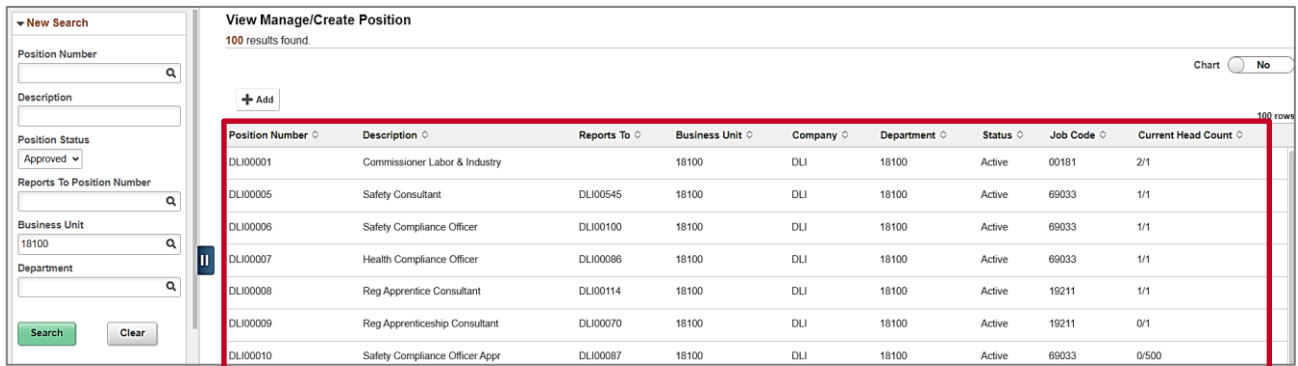
Note: Users will only see approved positions granted by their security access.

- Search for the applicable position using the fields on the left sidebar.

Note: All positions within the applicable parameter display if the **Business Unit** or **Department** fields are entered. If the Position Number is unknown, select “**Approved**” using the **Position Status** drop-down menu to retrieve a list of all accessible positions within the selected search parameters.

- Click the **Search** button.

The **Manage/Create Position** page refreshes and the search results display.



Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
DLI00001	Commissioner Labor & Industry		18100	DLI	18100	Active	00181	2/1
DLI00005	Safety Consultant	DLI00545	18100	DLI	18100	Active	69033	1/1
DLI00006	Safety Compliance Officer	DLI00100	18100	DLI	18100	Active	69033	1/1
DLI00007	Health Compliance Officer	DLI00086	18100	DLI	18100	Active	69033	1/1
DLI00008	Reg Apprentice Consultant	DLI00114	18100	DLI	18100	Active	19211	1/1
DLI00009	Reg Apprenticeship Consultant	DLI00070	18100	DLI	18100	Active	19211	0/1
DLI00010	Safety Compliance Officer Appr	DLI00087	18100	DLI	18100	Active	69033	0/500

- Select the applicable position by clicking anywhere in the corresponding row.

The **Position Details** page displays.



Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	New Position	Dept of Labor and Industry	DEPT OF LABOR AND INDUSTRY	Compliance/Safety Officer III	MANASSAS REGIONAL OFFICE	Approved	Approval Chain

- Click the **Expand** icon (>) at the end of the row for view only pages of position.



Human Resources Job Aid

HR351_Managing Position Data

The **View Position** page displays the details of the selected position in view only format.

Position Number DLI00014		Headcount Status Filled		Current Head Count 1 of 1	
Effective Date	01/01/1901	Review Date		Position Months	12.00
Effective Sequence	0	Reason	NEW New Position	Stmnt of Economic Interest Reqd	Yes
Approval Status	Approved	VPA Covered	Yes		
Position Information					
Position Status	Approved	Max Head Count	1		
Status	Active	Status Date	09/21/2022		
Action Date	09/21/2022	SOC Code / Extension	29-9011		
Key Position	No	Job Sharing Permitted	No		
Budgeted Position	Yes	Available for Telework	Yes		
Confidential Position	No	EEO-4 Job Category	Professionals		
Alternate Work Schedule	No	Workers' Comp Code	8810		

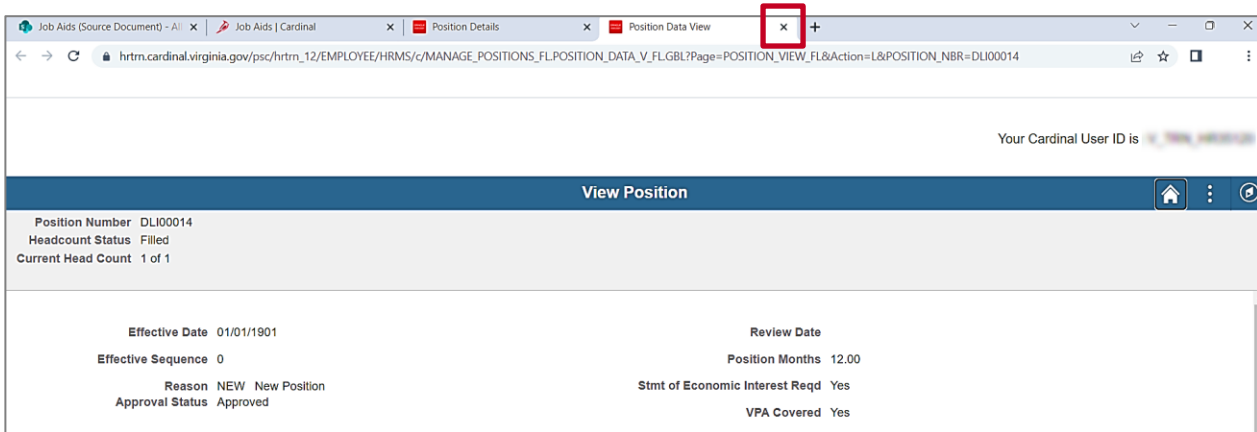
Salary Plan Information							
Pay Plan					Grade	4	
Salary Admin Plan	NV				Step		
Standard Hours	40.00						
Work Period	W	Weekly					
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
<ul style="list-style-type: none"> ▶ USA ▶ Specific Information ▶ Education and Government <li style="border: 2px solid red;">▶ Budget and Incumbents ▶ Summary of Changes 							

6. Scroll down to expand the **Budget and Incumbents** section.

▶ Education and Government									
▼ Budget and Incumbents									
Earnings	0.000	Cdn Tax	0.000						
Deductions	0.000	Total	0.00						
Tax	0.000								
Update Incumbents	Yes								
Include Salary Plan/Grade	Yes								
Force Update for Title Changes	Yes								
Current Incumbents 1 row									
Name	Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
JOHN DOE	0035	0	Full-Time	40.00	09/24/2022	Data Change	Conversion	N	Job Data
CI Exceptions									
▶ Summary of Changes									
▶ Attachments									

7. The job data of the current employee in the position is displayed here. Review the following fields in the **Current Incumbents** section.
 - a. **Name** – employee’s name
 - b. **Empl ID** – employee’s identification number
 - c. **Empl Record** – employee’s record associated with the position
 - d. **Full/Part** – identifies of the person in the position is full-time or part-time
 - e. **Stnd Hrs/Wrk** – number of hours per week the employee is scheduled to work
 - f. **Effective Date** – indicates the highest effective dated row on this employee’s job data
Note: Any date after this date can be used as the **Effective Date** for the Position Change.
 - g. **Action** – indicates the last action on the highest effective dated job data row for the employee
 - h. **Action Reason** – indicates the reason associated with the action on the highest effective dated job data row
8. Scroll to the very top of the page.

The browser tabs display.



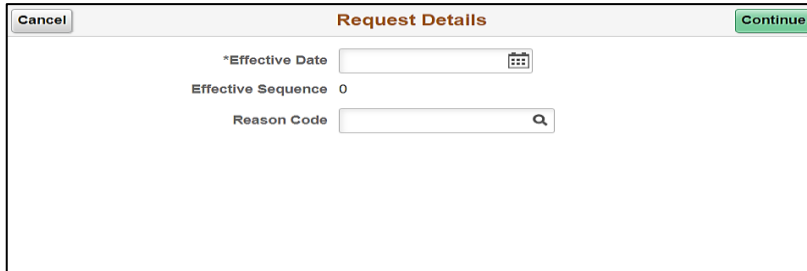
9. Click the **X** to close the **Position Data View** tab.

The **Position Details** page displays.

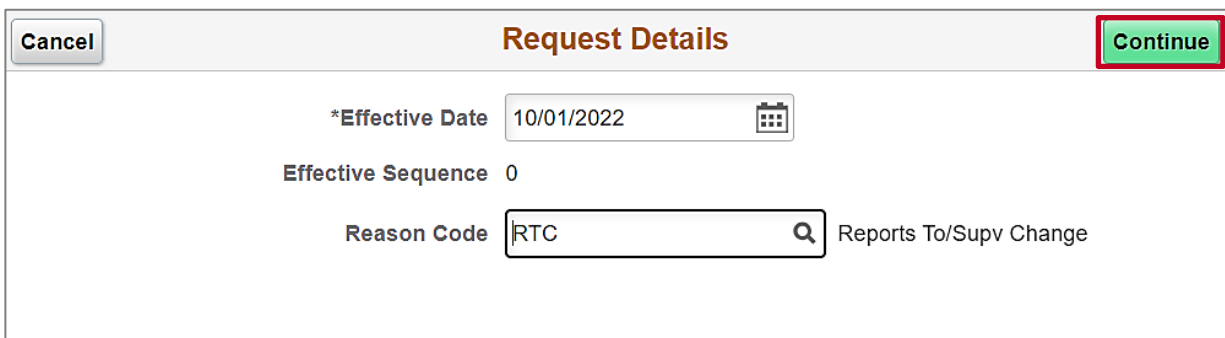


10. Click the **Insert a New Row** icon (+) to create a new effective dated row in order to make a change to the position.

The **Request Details** page displays in a pop-up window.

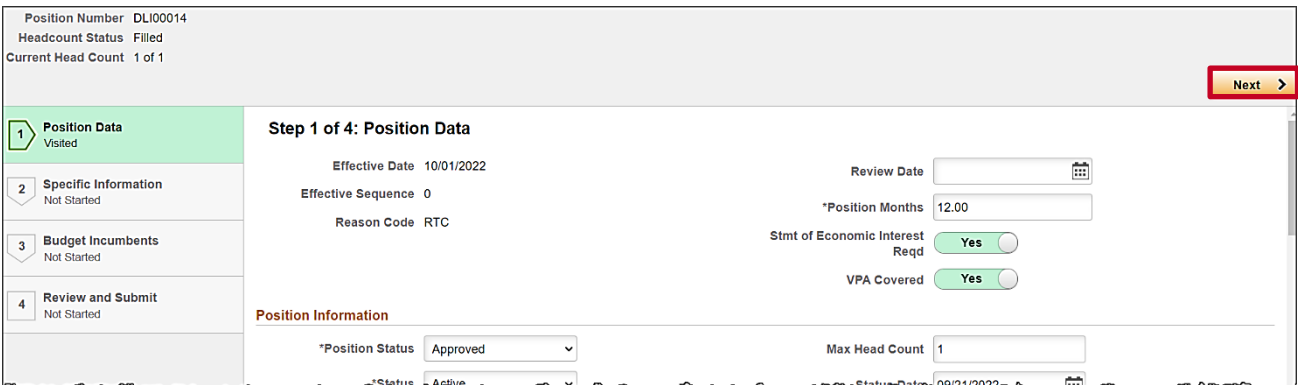


11. Enter the **Effective Date** of the position change.
12. Select the applicable **Reason Code**.



13. Click the **Continue** button.

The **Manage Position** page displays with the **Position Data** Step 1 of 4 displayed by default.



Note: When updating the department of an existing position, Position/Department funding may need to be assigned for the new position/department combination. For more information on assigning or updating position or department funding, see the Job Aid titled **HR351_Position Chartfield Assignment/Update**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

14. Click the following link to navigate to the screenshots and tables found in the Manage Position section of this Job Aid, which provide a brief description, important information, and dependencies (as applicable) for each field [Position Data Header Fields](#).

The **Manage Position** page displays with the **Review and Submit** Step 4 of 4 displayed.

Position Number DLI00014
Headcount Status Filled
Current Head Count 1 of 1

< Previous
Submit

<div style="border-bottom: 1px solid gray; padding: 2px;"> 1 Position Data Visited </div> <div style="border-bottom: 1px solid gray; padding: 2px;"> 2 Specific Information Visited </div> <div style="border-bottom: 1px solid gray; padding: 2px;"> 3 Budget Incumbents Visited </div> <div style="padding: 2px; background-color: #e0ffe0;"> 4 Review and Submit Visited </div>	<p style="text-align: center;">Step 4 of 4: Review and Submit</p> <p style="font-size: small;">Effective Date 10/01/2022 Reason Code RTC Reports To/Supv Change Effective Sequence 0 Approval Status Not Available</p> <p style="color: #c00000; font-weight: bold; font-size: small;">Summary Of Changes</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: x-small;"> <thead> <tr style="background-color: #f0f0f0;"> <th>Description</th> <th>Proposed Value</th> <th>Current Value</th> </tr> </thead> <tbody> <tr> <td>Reason Code</td> <td>RTC</td> <td>NEW</td> </tr> <tr> <td>Action Date</td> <td>2023-07-12</td> <td>2022-09-21</td> </tr> </tbody> </table>	Description	Proposed Value	Current Value	Reason Code	RTC	NEW	Action Date	2023-07-12	2022-09-21
Description	Proposed Value	Current Value								
Reason Code	RTC	NEW								
Action Date	2023-07-12	2022-09-21								

15. Review **Summary of Changes** section (**Proposed Value** and **Current Value** column entries for field updated).

Note: This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking submit.
16. If additional information is required, click the **Previous** button and navigate back to the applicable step(s).
17. Click the **Submit** button after verifying all information.

The **Position Confirmation** page displays.

✔ The Position Number DLI00014 has been successfully updated.

Position Number DLI00014
Headcount Status Filled
Current Head Count 1 of 1

Go to Position Details
Go to Manage/Create Position

Note: Click the **Go to Position Details** button to return and view the updated information for the position or click the **Go to Manage/Create Position** button to create another position or search for another position and make changes.

Note: When updating the department of an existing position, Position/Department funding may need to be assigned. For more information on assigning or updating position or department funding, see the Job Aid titled **HR351_Position Chartfield Assignment/Update**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.