Munis HR Management Module

Position/Budget Request

Objective:

This document will outline the new procedures to use for USVI for departmental request for new positions or for changes to existing positions.

This process will be used to request the following changes:

- NEWP – New Position Request.
- CHGP – Changes to Existing Positions
- POSF – Request to fill an existing position with no position changes

User Prerequisite – Before completing this procedure please take steps to review the position you want to change and note the following items for any changes you wish to request or for any new position you wish to create:

- Job Class code
- Location value to assign
- GL Account or Allocation to assign to new position request

You must also fill out the official **Personnel Requisition Form** including any supporting documentation required by the Government of the United States Virgin Islands. A copy of this form must be scanned, printed or otherwise saved in .pdf format in a folder available to you on your workstation.

Position/Budget Request

Payroll
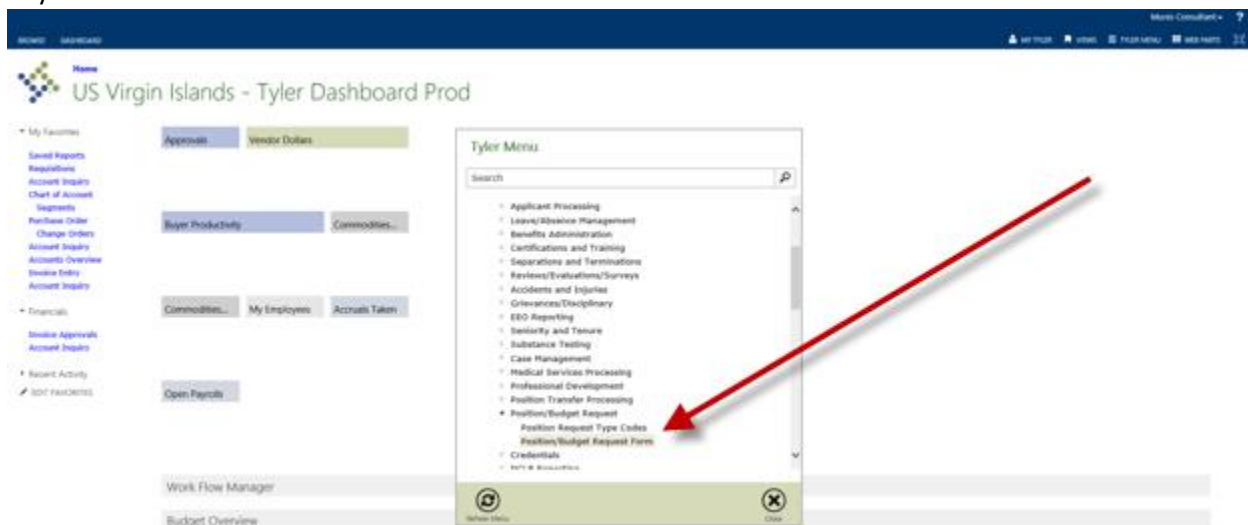
🖱 Payroll/HR > HR Management > Position/Budget Request > Position/Budget Request Forms

Adding a new Position/Budget Request

Step 1.   Click ✚ to **Add** a new record

Step 2.   Click ▯+1▯ to assign the next **Request Number** value

Step 3.   Select appropriate **Request Type** value from the drop down.

Step 4.   Use **Request Comments** to type a summary of your request. This field accepts free form text in unlimited length. You may also wish to copy text written in Word or notepad using standard "Copy/Paste" techniques.

Step 5.   Click ✔ Accept to finalize entry of this form.

Attaching Personnel Request Form

Once the initial Positon/Budget Request (PBR) has been created, take the following steps to attach a copy of the USVI Personnel Request Form to this record.

Step 1. Click the **Paper Clip** icon highlighted above to open **Tyler Content Manager (TCM)**
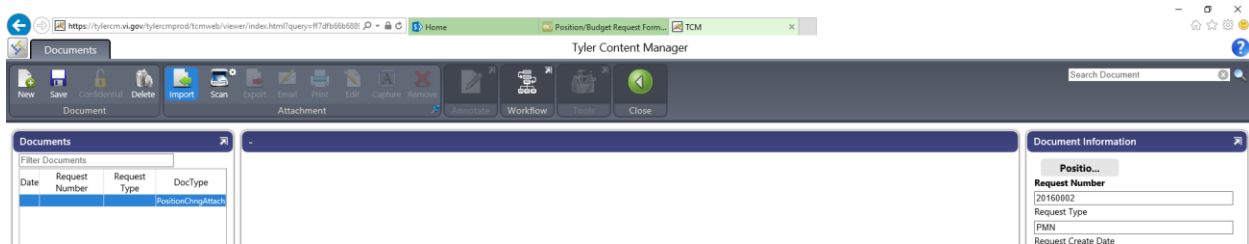

**Step 2.** Select the **Position/Budget Change Attachment** option
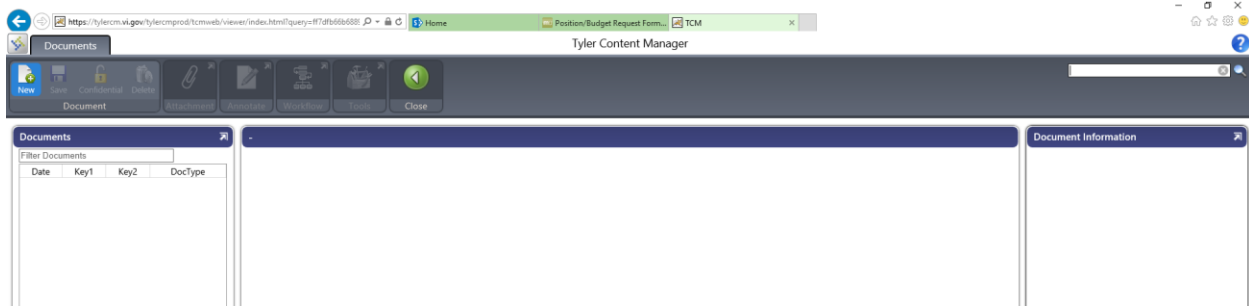
Step 3.   Click the icon for **New** document

Step 4.   Select option to **Import** if copy of your **Personnel Request Form** has been saved to your workstation or a network folder. Select option to **Scan** if a scanner has been configured to your workstation and you will use that to scan an image of the **Personnel Request Form** directly into TCM.

Step 5.   Follow the screen prompts provided to either select your saved document (**Import**) or scan your document (**Scan**).
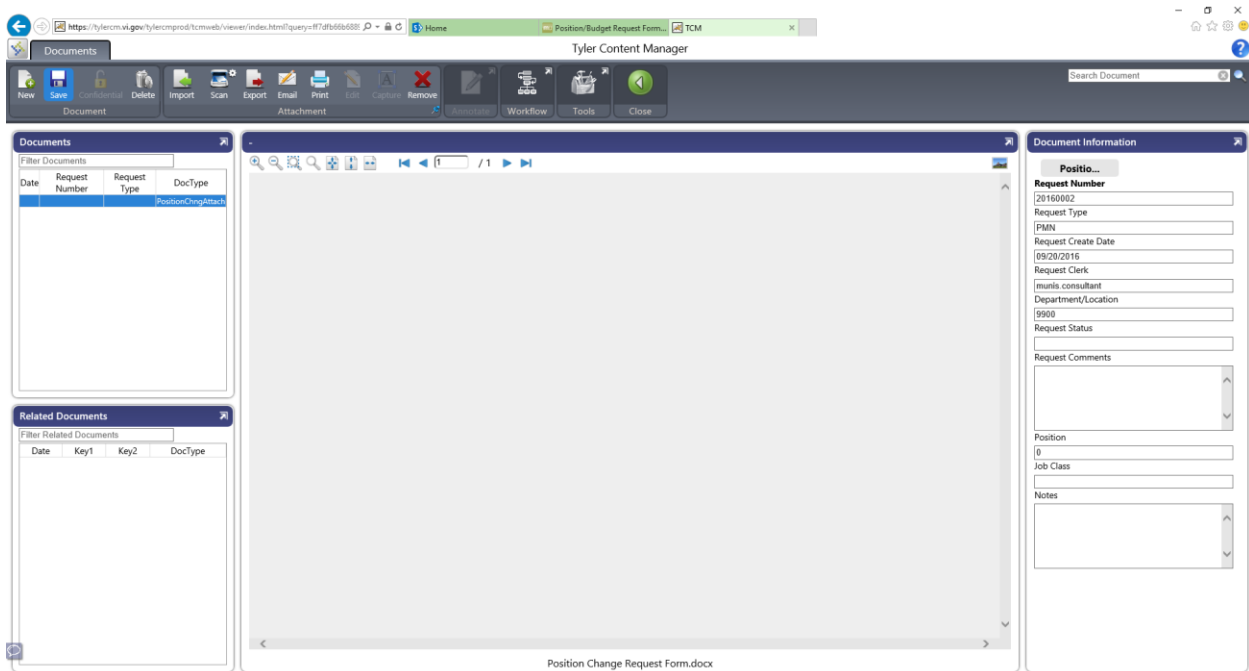
Step 6.   On completion, click **Save** to save this document.

Step 7.   Open the document and verify that you can view it and that it is the correct document for this transaction.

Adding New Position/Changing Existing Position

Once the steps outlined above have been completed, use the following steps to either enter information about the new position you are requesting or to make changes to an existing position

Click **Position Change** button as indicated above
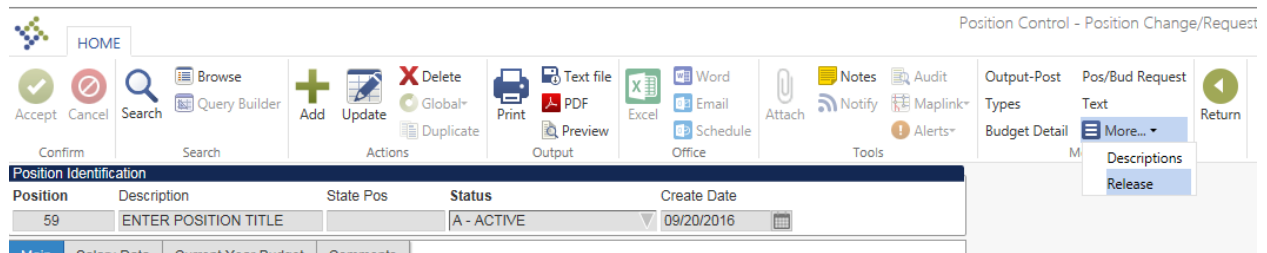
Requesting New Position

Step 1.   <Tab> through **Position** field to add new position number

Step 2.   Enter Position Description Information ("DPNR Field Technician")

Step 3.   Select **Status** as **Active**

Step 4.   <Tab> through **Create Date** to assign "Today's" date or enter appropriate value

Step 5.   Enter **Job Class** code (can use Field Help to select from list)

Step 6.   Select the correct **Location** value

Step 7.   <Tab> to GL Account fields and enter correct GL **Org, Object, Project** combination or select the correct **Allocation** value to be assigned.

Step 8.   Click ✅ Accept to finalize this transaction

Step 9.   From menu ribbon, click **More.**

Step 10.   Click **Release** to release your request for approval.

Step 11.   Click **Return** to return to main Position/Budget Request screen

Requesting Change to Existing Position

Step 1.   Enter number for existing position to be changed and <tab>

Step 2.   Click **Yes** when prompted by system as shown:

Position Exists

WARNING: position 91024 already exists as live position.
Create position modifications to be approved?
This will COMPLETELY overwrite existing position if approved.

[Yes] [No]

Step 3. Use your <Tab> key to move forward through fields and make the necessary changes. USVI Policy from DOP and OMB should be followed when making changes to fields. Primary fields that will be changed on an existing position include:

    a. Active Status when making an active position **Inactive** or vice versa
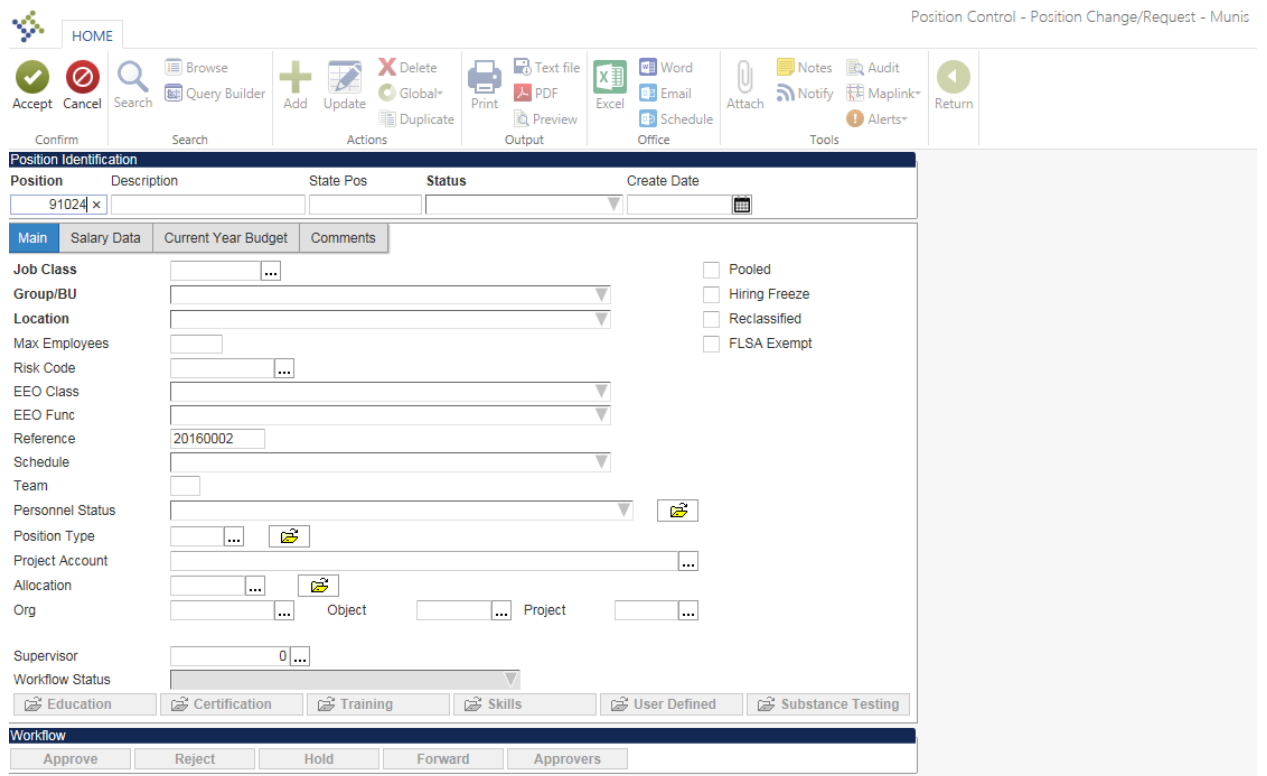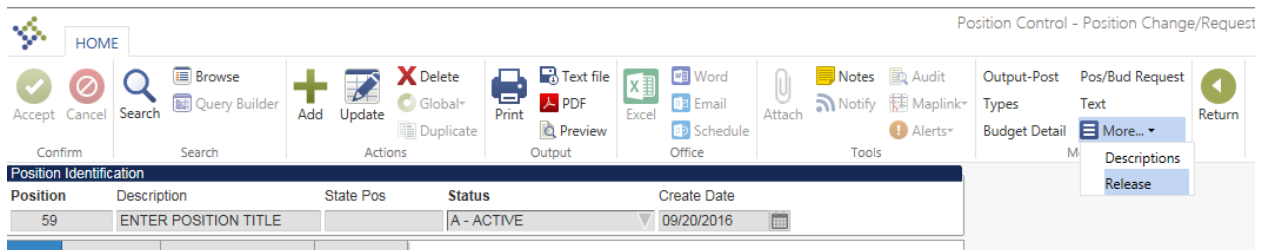
    b. Changes made to GL accounts/Allocation values

Step 4. Click to finalize this transaction

Step 5. From menu ribbon, click **More.**

Step 6. Click **Release** to release your request for approval.

Step 7. Click **Return** to return to main Position/Budget Request screen

Releasing Position Budget Request for Approval

Once all of these steps are complete, click the option **Release** from the ribbon menu as shown:

Click **Yes** when prompted complete this process.

The steps outlined above will address basic **New Positon** and **Existing Position Change** requests. Additional transaction types will use these steps with certain modifications.

Steps for individual transaction types

Replace one positon with another:

- Will require at least two separate PBR's
    - One to change existing positon to "Inactive" (CHGP). If multiple positions are being removed to fund the new position additional CHGP requests may be added.
    - One to request a new position (NEWP)

Request changes to multiple positions or request multiple new positions

- Will require individual PBR transactions for each position change or new position requested

Additional transaction types will be defined internally