Munis HR Management Module

Position/Budget Request

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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

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

Adding a new Position/Budget Request

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Position/Budget Request	
Request Number 20160001 +1	Request Comments
Request Type PMN - NEW POSITION REQUEST	Use this section to outline, in summary, the reason for your
Request Created 09/20/2016	request. Information entered into this field is free-form text of unlimited length. In addition, verbiage from an external
Request Clerk rob.schmid	document may also be copied here using standard "Copy/Paste"
Department 135 FINANCE DEPARTMENT	functionality (Word, Notepad, etc.)
Request Status	\checkmark
	Approve Reject Hold Forward Approvers
Employee Identification	
Employee SSN Last Name First Name	Middle Name MI
Personnel Action	Position Change
Personnel Action Effective Date	Position
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- 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.

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Confirm Position/Budget Requ	Search	Actions	Output	Office		lools	Menu				
Request Number	20160001 +1			Request Comments							
Request Type	PMN - NEW POSITIO	N REQUEST	$\overline{\nabla}$	Use this section to outline, in summary, the reason for your request. Information entered into this field is free-form text of							
Request Created	09/20/2016			unlimited length. In addition, verbiage from an external							
Request Clerk	rob.schmid			document may also functionality (Word	so be copied here using standard "Copy/Paste"						
Department	135 FINAN	ICE DEPARTMENT		functionality (word	, Notepau, etc.)						
Request Status	N - NOT RELEASED		$\overline{\nabla}$				\sim				
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Step 1. Click the **Paper Clip** icon highlighted above to open **Tyler Content Manager (TCM)**

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Step 2. Select the **Position/Budget Change Attachment** option

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Step 3. Click the icon for **New** document

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- 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.

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	Position Change Request 1. Open Position Control 2. "Search" for specific position number 3. Click Position Change	Request Clerk MUNIS CONSULTANT Department/Location 9900 Request Status Request Comments
Related Documents Pile Filer Related Documents Doctype Date Key1 Key2 Doctype		Position 0 Job Class Notes ✓
	Position Change Request Form.docx	

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

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Request Number 20160001 +1	Request Comments
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Request Created 09/20/2016	unlimited length. In addition, verbiage from an external
Request Clerk rob.schmid	document may also be copied here using standard "Copy/Paste" functionality (Word, Notepad, etc.)
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Click Position Change button as indicated above

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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.

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59	ENTER POSITION TITLE			A - A	CTIVE		∇	09/20/2016						
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Requesting Change to Existing Position

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

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



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 Accept 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:

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Accept Cancel Sear	ch Browse	Add Update	Duplicate Pr	int Dutput	Excel	U Attach	Notify	Audit Maplink* Alerts*	Release	Return		
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Request Number	20160001 +1				Request Comment	s						
Request Type	PMN - NEW POSITION REQUEST Vuse this section to outline, in summary, the reason for your											
Request Created	09/20/2016			request. Information entered into this field is free-form text of unlimited length. In addition, verbiage from an external								
Request Clerk	rob.schmid				document may also be copied here using standard "Copy/Paste" functionality (Word, Notepad, etc.)							
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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