

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

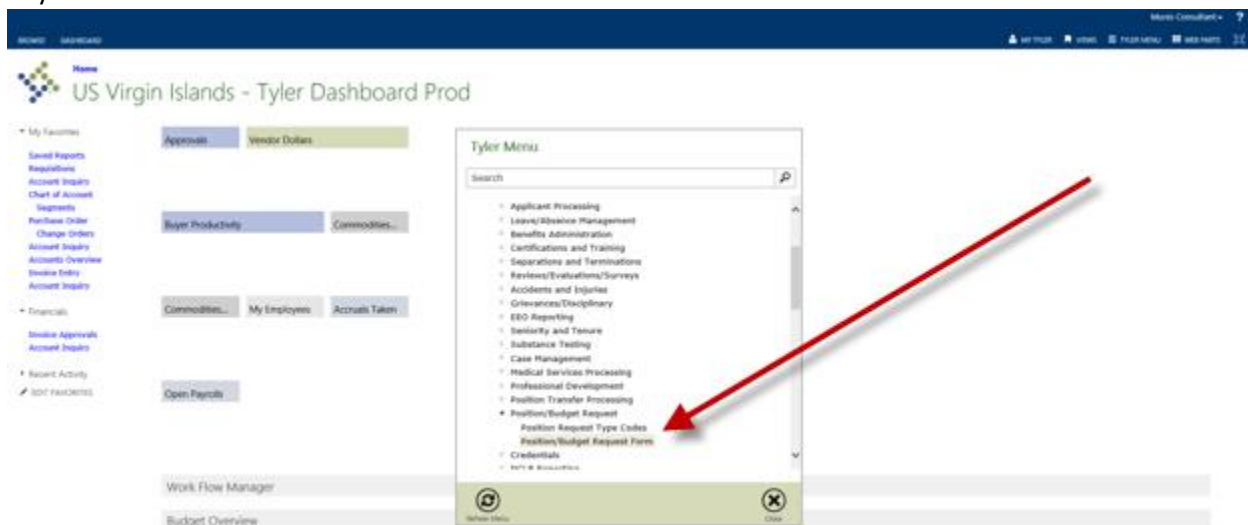
User Prerequisite – Before completing this procedure please take steps to review the position you want to change and note the following items for any changes you wish to request or for any new position you wish to create:

- 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

Payroll



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

Adding a new Position/Budget Request

Position/Budget Request Form - Munis

Position/Budget Request

Request Number: 20160001

Request Type: PMN - NEW POSITION REQUEST

Request Created: 09/20/2016

Request Clerk: rob.schmid

Department: 135 FINANCE DEPARTMENT

Request Status:

Request Comments

Use this section to outline, in summary, the reason for your request. Information entered into this field is free-form text of unlimited length. In addition, verbiage from an external document may also be copied here using standard "Copy/Paste" functionality (Word, Notepad, etc.)

Employee Identification

Employee: SSN: Last Name: First Name: Middle Name: MI:

Personnel Action

Effective Date: Action Code: Reason/Auth: Action Category:

Position Change

Position: Status: Job Class: Group/BU: Location: Position Type:

Personnel Workflow



Workflow Status:

Position Change Workflow

Workflow Status:

Budgetary Data

Journal: Fiscal year: Period:

- Step 1. Click  to **Add** a new record
- Step 2. Click 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  to finalize entry of this form.

Attaching Personnel Request Form

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

Position/Budget Request Form - Muni

HOME

Accept Cancel Search Browse Query Builder Add Update Delete Global Duplicate Print Text file PDF Excel Word Email Schedule Attach Notes Notify Maplink Alerts Release Return

Confirm Search Actions Output Office Tools Menu

Position/Budget Request

Request Number: 20160001 +1

Request Type: PMN - NEW POSITION REQUEST

Request Created: 09/20/2016

Request Clerk: rob.schmid

Department: 135 FINANCE DEPARTMENT

Request Status: N - NOT RELEASED

Request Comments: Use this section to outline, in summary, the reason for your request. Information entered into this field is free-form text of unlimited length. In addition, verbiage from an external document may also be copied here using standard "Copy/Paste" functionality (Word, Notepad, etc.)

Approve Reject Hold Forward Approvers

Employee Identification

Employee SSN Last Name First Name Middle Name MI

Personnel Action

Effective Date

Position Change

Position 0

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

Document Mappings

Attachment Documents

Attachment Type	Document Type	Read Only	Count	Required
Generic Attachment	Attachment (no searchable metadata)		0	

Maintain

Associated Documents

Document Title	TCM Document Type	Read Only	Count
Position/Budget Change Attachment	Position/Budget Change Attachment		0

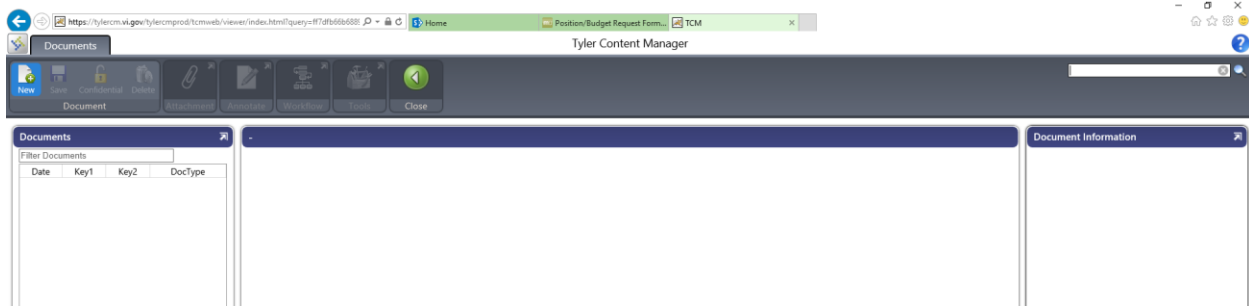
Maintain

View Documents

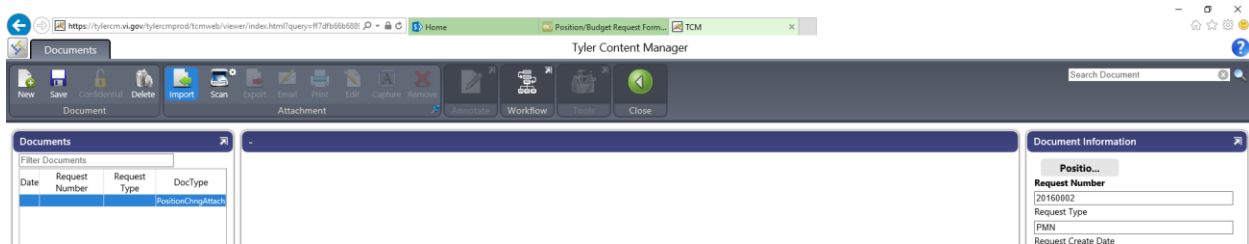
TCM Version: 2016.2.1.1

Show Counts

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

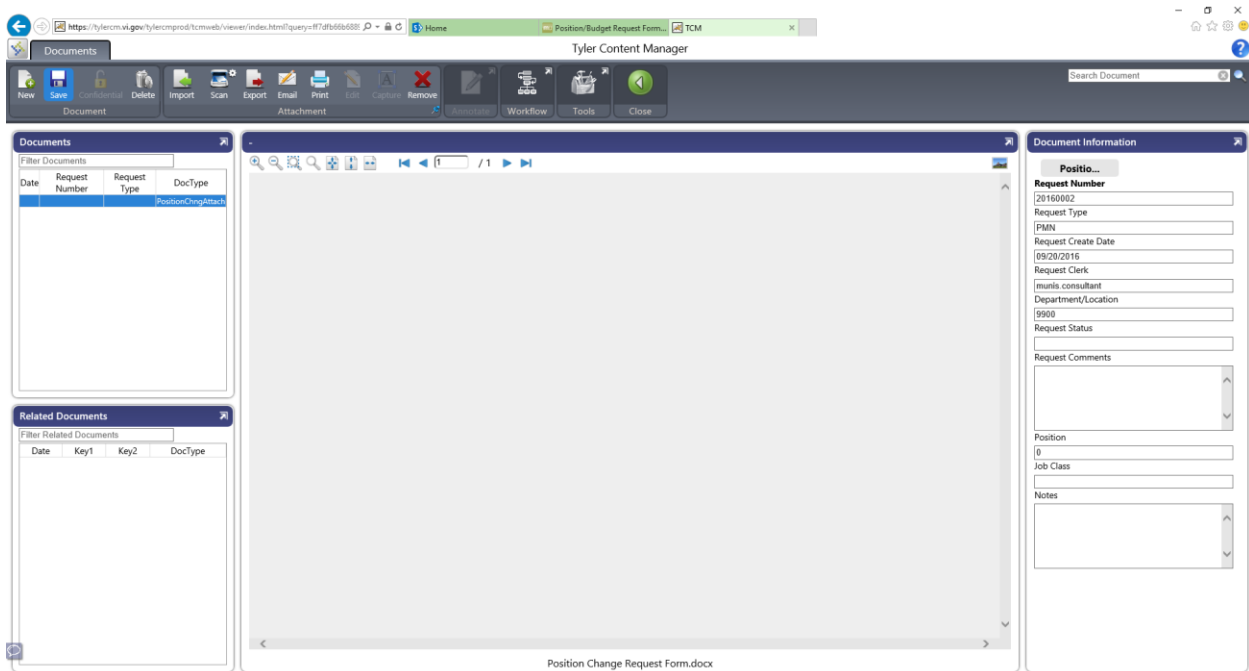


Step 3. Click the icon for **New** document



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.

The screenshot displays the Tyler Content Manager web application. The top navigation bar includes a search bar and various document management icons. The main content area is titled 'Position/Budget Change Attachment - 20160002' and contains a document titled 'Position Change Request'. The document content includes a list of steps: 1. Open Position Control, 2. "Search" for specific position number, and 3. Click Position Change. Below the text is a screenshot of a 'Position Change Request Form.docx' with a red arrow pointing to a specific field. The left sidebar shows a 'Documents' list with columns for Date, Request Number, Request Type, and DocType. The right sidebar shows 'Document Information' with fields for Request Number, Request Type, Request Create Date, Request Clerk, Department/Location, Request Status, Request Comments, Position, Job Class, and Notes.

Documents

Date	Request Number	Request Type	DocType
09/20/2016	20160002	PMN	PositionCngAttach

Related Documents

Date	Key1	Key2	DocType
------	------	------	---------

Position/Budget Change Attachment - 20160002

Position Change Request

1. Open Position Control
2. "Search" for specific position number
3. Click Position Change

Position Change Request Form.docx

Document Information

Request Number
20160002

Request Type
PMN

Request Create Date
09/20/2016

Request Clerk
MUNIS CONSULTANT

Department/Location
9900

Request Status

Request Comments

Position
0

Job Class

Notes

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

Position/Budget Request Form - MuniS

Request Number: 20160001
Request Type: PMN - NEW POSITION REQUEST
Request Created: 09/20/2016
Request Clerk: rob.schmid
Department: 135 FINANCE DEPARTMENT
Request Status: N - NOT RELEASED

Request Comments: Use this section to outline, in summary, the reason for your request. Information entered into this field is free-form text of unlimited length. In addition, verbiage from an external document may also be copied here using standard "Copy/Paste" functionality (Word, Notepad, etc.)

Employee Identification
Employee: SSN: Last Name: First Name: Middle Name: MI:

Personnel Action
Effective Date: Action Code: Reason/Auth: Action Category: Action Checklist: Personnel Action: Position Change: Position: Status: Job Class: Group/BU: Location: Position Type: Position Change

Personnel Workflow
Workflow Status: Approve Reject Hold Forward Approvers

Budgetary Data
Journal: Fiscal year: Period: Budget Amendment

Click **Position Change** button as indicated above

Position Control - Position Change


Position Identification
Position: 625 NEW POS TITLE
State Pos: Status: A - ACTIVE
Create Date: 09/20/2016

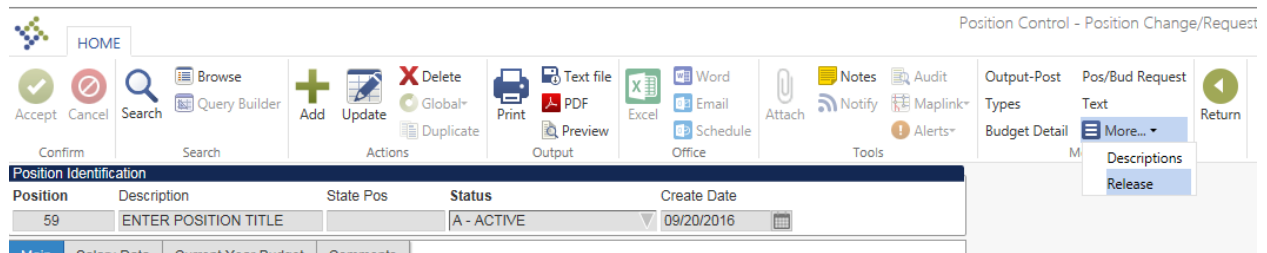
Main
Salary Data
Job Class: EX30 EXEMPT30
Group/BU: EXMT - EXEMPT
Location: 1203 - HUMAN RESOURCES ST THOMAS
Max Employees: 1.00
Risk Code: EEO Func: Reference: 20160002
Schedule: Team: Personnel Status: Position Type: Allocation: 0
Org: 00120001 Object: 511010 Project: Supervisor: Workflow Status: Certification Training Skills User Defined Substance Testing

Comments

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.

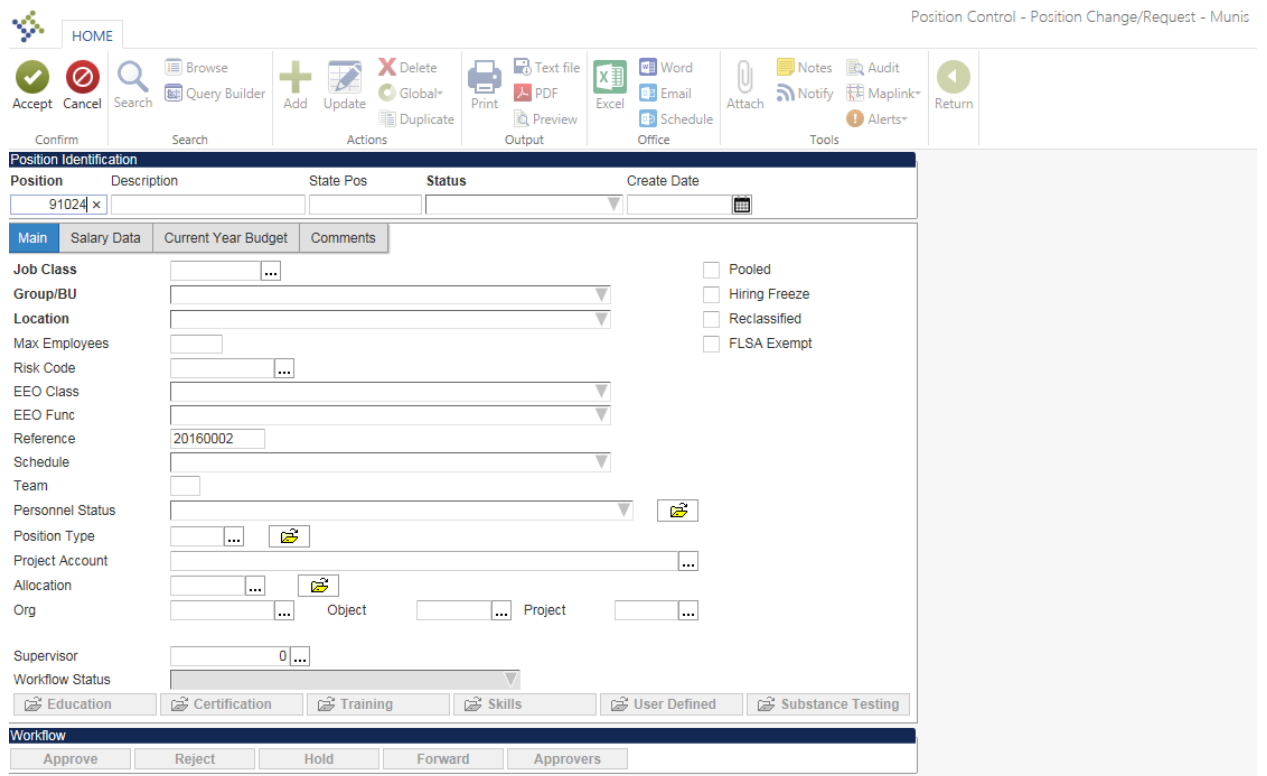
- Step 8. Click  to finalize this transaction
- Step 9. From menu ribbon, click **More**.
- Step 10. Click **Release** to release your request for approval.



- 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:



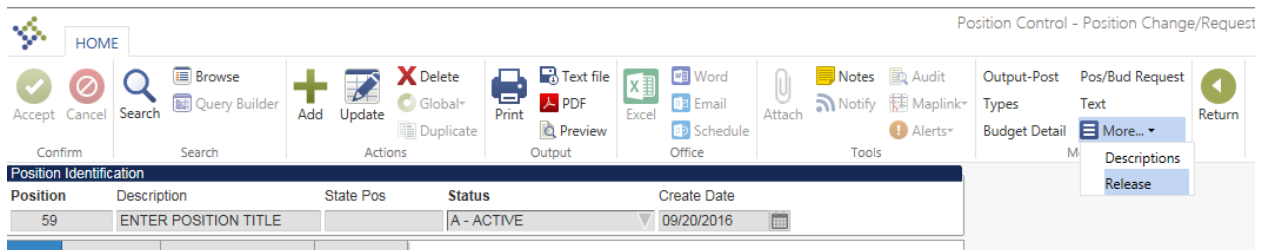
Step 3. Use your <Tab> key to move forward through fields and make the necessary changes. USVI Policy from DOP and OMB should be followed when making changes to fields. Primary fields that will be changed on an existing position include:

- 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:

Position/Budget Request Form - Muni

Request Number: 20160001
Request Type: PMN - NEW POSITION REQUEST
Request Created: 09/20/2016
Request Clerk: rob.schmid
Department: 135 FINANCE DEPARTMENT
Request Status: N - NOT RELEASED

Request Comments: Use this section to outline, in summary, the reason for your request. Information entered into this field is free-form text of unlimited length. In addition, verbiage from an external document may also be copied here using standard "Copy/Paste" functionality (Word, Notepad, etc.)

Employee Identification: Employee, SSN, Last Name, First Name, Middle Name, MI

Personnel Action: Effective Date, Position Change (59)

Release For Approval: Release this position/budget request for approval? Yes No

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

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

Steps for individual transaction types

Replace one position with another:

- Will require at least two separate PBR's
 - One to change existing position 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