3.0 Position Management

Instructions
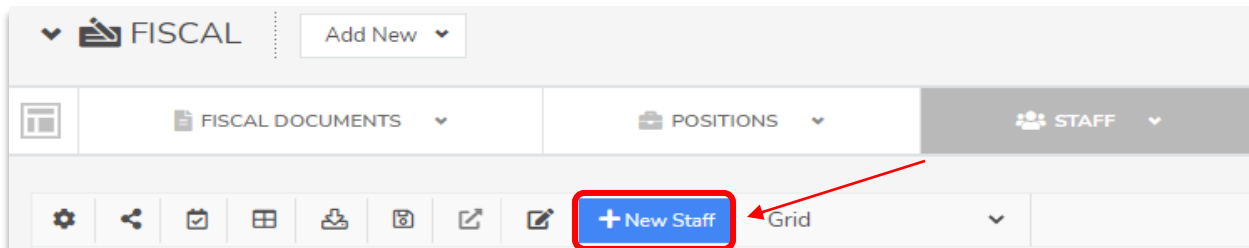
Table of Contents

Scenario A (Before Budget is created):

Need a new position for a new employee

❖ Under Fiscal - go to your Program page
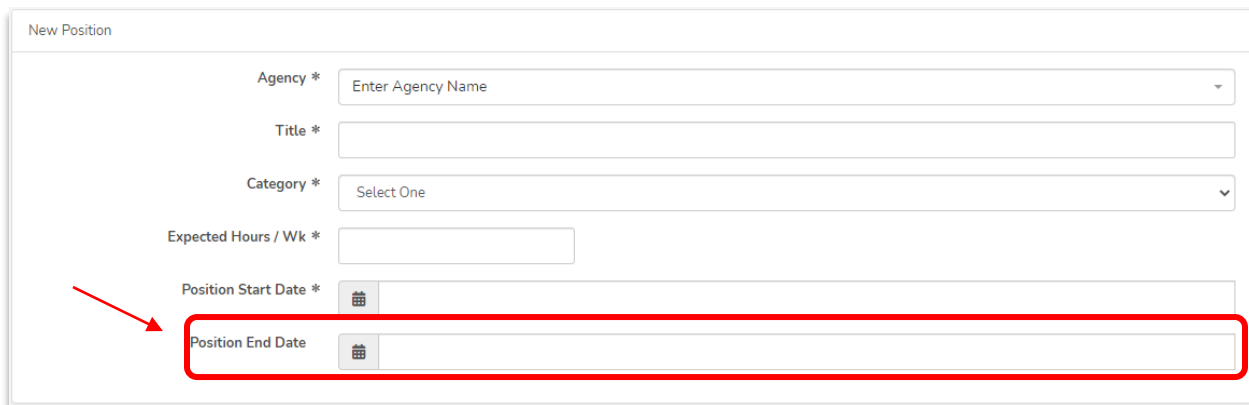 ➢ For New Staff go to the top of page and click on STAFF

❯ 🗂 FISCAL	Add New ⌄		
🖻	📄 FISCAL DOCUMENTS ⌄	💼 POSITIONS ⌄	👥 STAFF ⌄
⚙ ⤬ 🗓 ▦ 🖫 🖫 🔳 🖉	**+ New Staff**	Grid	⌄

  ➢ Fill in Staff Detail information and Save. Once Saved go back to top of page.
❖ Click on POSITIONS.

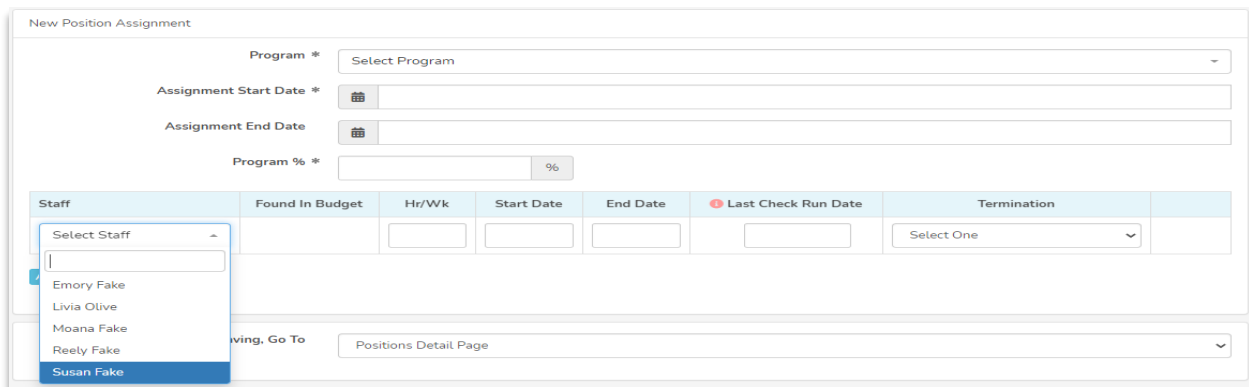| POSITIONS ⌄ |
|---|
| New Position |

❖ Choose New Position
❖ New page will come up and you will fill in all the information that is needed and SAVE

New Position

Agency *	Enter Agency Name	⌄
Title *		
Category *	Select One	⌄
Expected Hours / Wk *		
Position Start Date *	📅	
Position End Date	📅	

❖ Remember do not put a Position End Date in.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.

New Position Assignment

Program *	Select Program	⌄
Assignment Start Date *	📅	
Assignment End Date	📅	
Program % *		%

Staff	Found In Budget	Hr/Wk	Start Date	End Date	🔴 Last Check Run Date	Termination
Select Staff ▲						Select One ⌄
Emory Fake						
Livia Olive						
Moana Fake						
Reely Fake						
Susan Fake	...ving, Go To	Positions Detail Page				⌄

❖ The Position should show up on the Budget page under Regular Salaries and Wages.

Title
Regular Salaries and Wages
FICA

Position
CEO
Data Clerk
Data Manager
Program Manager

Scenario B (Before Budget is created):

Need a new position for an existing employee

❖ Under Fiscal - go to your Program page
❖ Click on POSITIONS.
❖ Choose New Position
❖ New page will come up and you will fill in all the information that is needed and SAVE
❖ Remember do not put a Position End Date in.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.
❖ The Position should show up on the Budget page under Regular Salaries and Wages.

Scenario C (Before Budget is created):

Need an existing position filled by a new employee

❖ Under Fiscal – go to you Program page
  ➢ For New Staff go to the top of page and click on STAFF
  ➢ Fill in Staff Detail information and Save. Once Saved go back to top of page.
❖ Click on Positions. Then click on Search. Search for your Program Name
❖ A list of your Positions will come up, choose the position you want the New Employee to be assigned to.
❖ Once you have chosen the correct Position and clicked View, the Position page will come up
❖ On the top right hand of page, you will see Modify Assignment, click on this

Modify Assignment

❖ The Position Assignment page will come up and then click on Add Staff Assignment.

Add Staff Assignment

❖ The new staff's name will show up and then fill in Hr./Wk and Start Date only. Save Assignment.
❖ The Position should show up on the Budget page under Regular Salaries and Wages.

Scenario D (Before Budget is created)
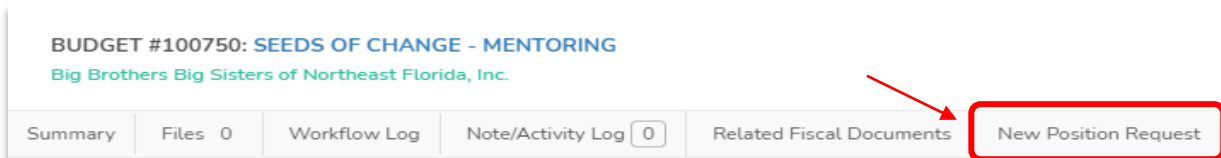
Need an existing position filled by an existing employee.

❖ Click on Positions. Then click on Search. Search for your Program Name
❖ A list of your Positions will come up, choose the position you want the existing Employee to be assigned to.
❖ Once you have chosen the correct Position and clicked on it, the Position page will come up
❖ On the top right hand of page, you will see Modify Assignment, click on this
❖ If the Position was filled by someone who left the program, you will need to type in the End Date, Last Check Run Date, and the reason for leaving the program.
❖ The Position Assignment page will come up and then click on Add Staff Assignment.
❖ The staff's name will show up and then fill in Hr./Wk and Start Date only. Save Assignment.

Staff	Found In Budget	Hr/Wk	Start Date	End Date	⚠ Last Check Run Date	Termination	
Livia Olive	No	40	09/07/2021	09/10/2021	09/10/2021	Promotion ⌄	Delete
Reely Fake ✕ ⌄		40	09/11/2021			Select One ⌄	Delete

❖ The Position should show up on the Budget page under Regular Salaries and Wages.

Scenario A for Budget (Status is approved)

❖ Under Fiscal - go to your Program page
    ➢ For New Staff go to the top of page and click on STAFF
    ➢ Fill in Staff Detail information and Save. Once Saved go back to top of page.
❖ Click on POSITIONS and choose New Position
❖ New page will come up and you will fill in all the information that is needed and SAVE
❖ Remember do not put a Position End Date in.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment
❖ Creator will go to the original Budget and click on New Position Request.

BUDGET #100750: SEEDS OF CHANGE - MENTORING
Big Brothers Big Sisters of Northeast Florida, Inc.

| Summary | Files 0 | Workflow Log | Note/Activity Log 0 | Related Fiscal Documents | **New Position Request** |

❖ This will take you to another page, which will show you the New Position that you want to request approval for.
❖ Click on the Position and another page will come up, scroll down you will need to fill out the Salary amount and benefits. Be sure to click the button **Save & Submit to CSC.**

Position Expenses		
Account	Gross Salary & Wages	Program Allocation
Regular Salaries and Wages	0.00	0.00
FICA	0.00	0.00
Retirement Contributions	0.00	0.00
Life and Health Insurance	0.00	0.00
Workers Compensation	0.00	0.00
Unemployment Compensation	0.00	0.00
Total Fringe	$0.00	$0.00

Save   Save & Submit to CSC   Back to Position Requests

❖ The KHA Contract Manager will be the person who will approve or disapprove the Position.

Scenario A for Budget (Status is submitted)

❖ The Budget would need KHA Finance to rejected it back so the below steps can be completed.
❖ Under Fiscal - go to your Program page
  ➢ For New Staff go to the top of page and click on STAFF
  ➢ Fill in Staff Detail information and Save. Once Saved go back to top of page.
❖ Click on POSITIONS.
❖ Choose New Position
❖ New page will come up and you will fill in all the information that is needed and SAVE
❖ Remember do not put a Position End Date in.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.
❖ The Position should show up on the Budget page under Regular Salaries and Wages. You will need to fill out the allocated amounts for this Position.

Scenario A for Budget (Status is un-submitted which mean in Edit Mode for Agency)

Need a new position for a new employee

❖ Under Fiscal - go to your Program page
  ➢ For New Staff go to the top of page and click on STAFF
  ➢ Fill in Staff Detail information and Save. Once Saved go back to top of page.
❖ Click on POSITIONS.
❖ Choose New Position
❖ New page will come up and you will fill in all the information that is needed and SAVE
❖ Remember do not put a Position End Date in.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.
❖ The Position should show up on the Budget page under Regular Salaries and Wages. You will need to fill out the allocated amounts for this Position.

Scenario B for Budget (Status is approved)

❖ Under Fiscal - go to your Program page
❖ Click on POSITIONS.
❖ Choose New Position
❖ New page will come up and you will fill in all the information that is needed and SAVE
❖ Remember do not put a Position End Date in.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment
❖ Creator will go to the original Budget and click on New Position Request. This will take you to another page, which will show you the New Position that you want to request approval for.
❖ Click on the Position and another page will come up, you will need to fill out the Salary amount and benefits. Be sure to click the button **Save & Submit to CSC.**

Scenario B for Budget (Status is submitted)

Services Activities Management Information System
v1.0 12/13/2021

❖ The Budget would need KHA Finance to rejected it back so the below steps can be completed.
❖ Under Fiscal - go to your Program page
❖ Click on POSITIONS.
❖ Choose New Position
❖ New page will come up and you will fill in all the information that is needed and SAVE
❖ Remember do not put a Position End Date in.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.
❖ The Position should show up on the Budget page under Regular Salaries and Wages. You will need to fill out the allocated amounts for this Position.

Scenario B for Budget (Status is un-submitted which mean in Edit Mode for Agency)

❖ Under Fiscal - go to your Program page
❖ Click on POSITIONS.
❖ Choose New Position
❖ New page will come up and you will fill in all the information that is needed and SAVE
❖ Remember do not put a Position End Date in.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.
❖ Once this is completed the Position will show up on the Budget.

Scenario C for Budget (Status is approved)

❖ Budget would need to be rejected back to the Creator
❖ Under Fiscal – go to you Program page
  ➢ For New Staff go to the top of page and click on STAFF
  ➢ Fill in Staff Detail information and Save. Once Saved go back to top of page.
❖ Click on Positions. Then click on Search. Search for your Program Name
❖ A list of your Positions will come up, choose the position you want the New Employee to be assigned to.
❖ Once you have chosen the correct Position and clicked on it, the Position page will come up
❖ On the top right hand of page, you will see Modify Assignment, click on this.
❖ If the Position already had a staff in there but the New Staff is replacing them. You will need to go to the top of the page and click on Modified Assignment button. You will need to give the old staff an End Date, the Last Check Run Date, and the reason for leaving.
❖ Then click on Add Staff Assignment and chose the new staff that is replacing the other staff.
❖ Remember to use the Start Date that the new employee will be on the payroll. It will have to be at least one day after the close date of old staff.
❖ Remember do not put a Position End Date in for the New Staff.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.
❖ Once this is completed the Position will show up on the Budget.

Scenario C for Budget (Status is submitted)

❖ Budget would need to be rejected back to the Creator. If Position has been allocated money, then the new staff would have to be added and assigned to the Position.

❖ Under Fiscal – go to you Program page

➢ For New Staff go to the top of page and click on STAFF

➢ Fill in Staff Detail information and Save. Once Saved go back to top of page.

❖ Click on Positions. Then click on Search. Search for your Program Name

❖ A list of your Positions will come up, choose the position you want the New Employee to be assigned to.

❖ Once you have chosen the correct Position and clicked on it, the Position page will come up

❖ On the top right hand of page, you will see Modify Assignment, click on.

❖ If the Position already had a staff in there but the New Staff is replacing them. You will need to go to the top of the page and click on Modified Assignment button. You will need to give the old staff an End Date, the Last Check Run Date, and the reason for leaving.

❖ Then click on Add Staff Assignment and chose the new staff that is replacing the other staff.

❖ Remember to use the Start Date that the new employee will be on the payroll. It will have to be at least one day after the close date of old staff.

❖ Remember do not put a Position End Date in for the New Staff.

❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.

❖ Once this is completed the Position will show up on the Budget.

❖ The Position Assignment page will come up and then click on Add Staff Assignment. The new staff's name will show up and then fill in Hr./Wk and Start Date only. Save Assignment

❖ If Position has not been allocated money, then the Creator would have to allocate money to this position, then the new staff would have to be added and assigned to the Position.

Scenario C for Budget (Status is un-submitted which mean in Edit Mode for Agency)

❖ Under Fiscal - go to your Program page

➢ For New Staff go to the top of page and click on STAFF

➢ Fill in Staff Detail information and Save. Once Saved go back to top of page.

❖ Click on POSITIONS.

❖ New page will come up and you will fill in all the information that is needed and SAVE

❖ If the Position already had a staff in there but the New Staff is replacing them. You will need to go to the top of the page and click on Modified Assignment button. You will need to give the old staff an End Date, the Last Check Run Date, and the reason for leaving.

❖ Then click on Add Staff Assignment and chose the new staff that is replacing the other staff.

❖ Remember to use the Start Date that the new employee will be on the payroll. It will have to be at least one day after the close date of old staff.

❖ Remember do not put a Position End Date in for the New Staff.

❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.

❖ Once this is completed the Position will show up on the Budget.

Scenario D for Budget (Status is approved)

❖ Budget would need to be rejected back to the Creator
❖ Under Fiscal – go to you Program page
❖ Click on Positions. Then click on Search. Search for your Program Name
❖ A list of your Positions will come up, choose the position you want the staff to be assigned to.
❖ Once you have chosen the correct Position and clicked on it, the Position page will come up
❖ On the top right hand of page, you will see Modify Assignment, click on this.
❖ If the Position already had a staff in there but the Staff that is replacing them. You will need to go to the top of the page and click on Modified Assignment button. You will need to give the old staff an End Date, the Last Check Run Date, and the reason for leaving.
❖ Then click on Add Staff Assignment and chose the staff that is replacing the other staff.
❖ Remember to use the Start Date that the new employee will be on the payroll. It will have to be at least one day after the close date of old staff.
❖ Remember do not put a Position End Date in for the New Staff.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.
❖ Once this is completed the Position will show up on the Budget

Scenario D for Budget (Status is submitted)

❖ Budget would need to be rejected back to the Creator
❖ Under Fiscal – go to you Program page
❖ Click on Positions. Then click on Search. Search for your Program Name
❖ A list of your Positions will come up, choose the position you want the staff to be assigned to.
❖ Once you have chosen the correct Position and clicked on it, the Position page will come up
❖ On the top right hand of page, you will see Modify Assignment, click on this.
❖ If the Position already had a staff in there but the Staff that is replacing them. You will need to go to the top of the page and click on Modified Assignment button. You will need to give the old staff an End Date, the Last Check Run Date, and the reason for leaving.
❖ Then click on Add Staff Assignment and chose the staff that is replacing the other staff.
❖ Remember to use the Start Date that the new employee will be on the payroll. It will have to be at least one day after the close date of old staff.
❖ Remember do not put a Position End Date in for the New Staff.
❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.
❖ Once this is completed the Position will show up on the Budget.

Scenario D for Budget (Status is un-submitted which mean in Edit Mode for Agency)

❖ Under Fiscal – go to you Program page
❖ Click on Positions. Then click on Search. Search for your Program Name
❖ A list of your Positions will come up, choose the position you want the staff to be assigned to.
❖ Once you have chosen the correct Position and clicked on it, the Position page will come up
❖ On the top right hand of page, you will see Modify Assignment, click on this.

❖ If the Position already had a staff in there but the Staff that is replacing them. You will need to go to the top of the page and click on Modified Assignment button. You will need to give the old staff an End Date, the Last Check Run Date, and the reason for leaving.

❖ Then click on Add Staff Assignment and chose the staff that is replacing the other staff.

❖ Remember to use the Start Date that the new employee will be on the payroll. It will have to be at least one day after the close date of old staff.

❖ Remember do not put a Position End Date in for the New Staff.

❖ Assign Staff to the Position and complete the Hr./Wk and Start Date only. Save Assignment.

❖ Once this is completed the Position will show up on the Budget with the new staff name.