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, there may be multiple employees using the same Position Number. If the position headcount is less than the number of employees, a warning message will appear on job data. 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 Policy1.60 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 there may be 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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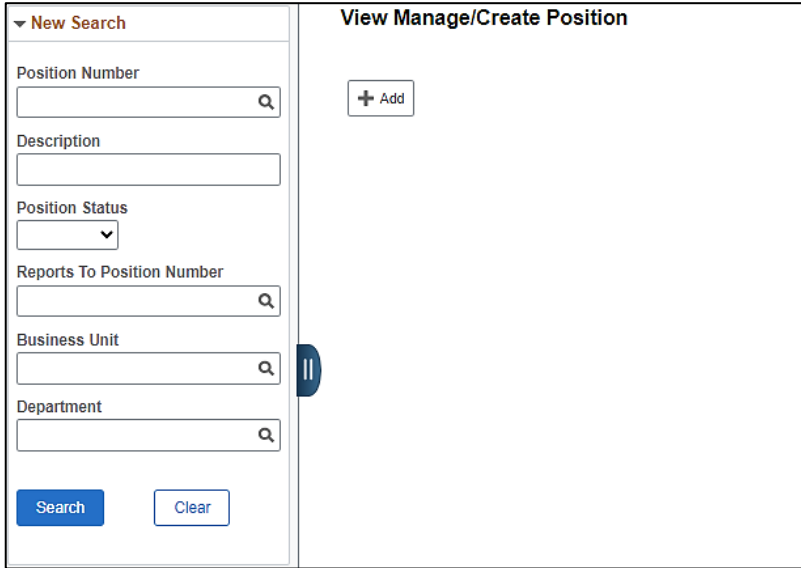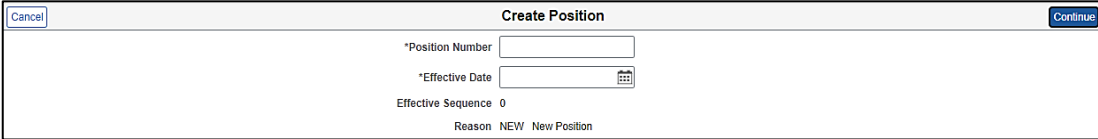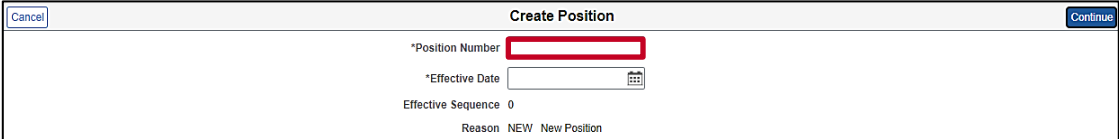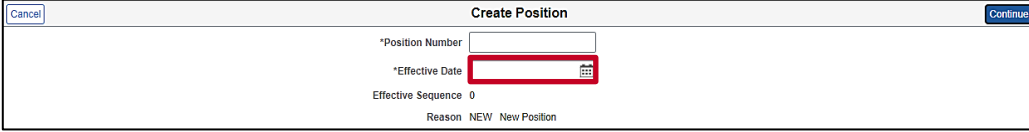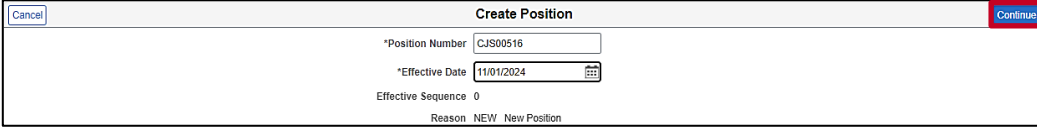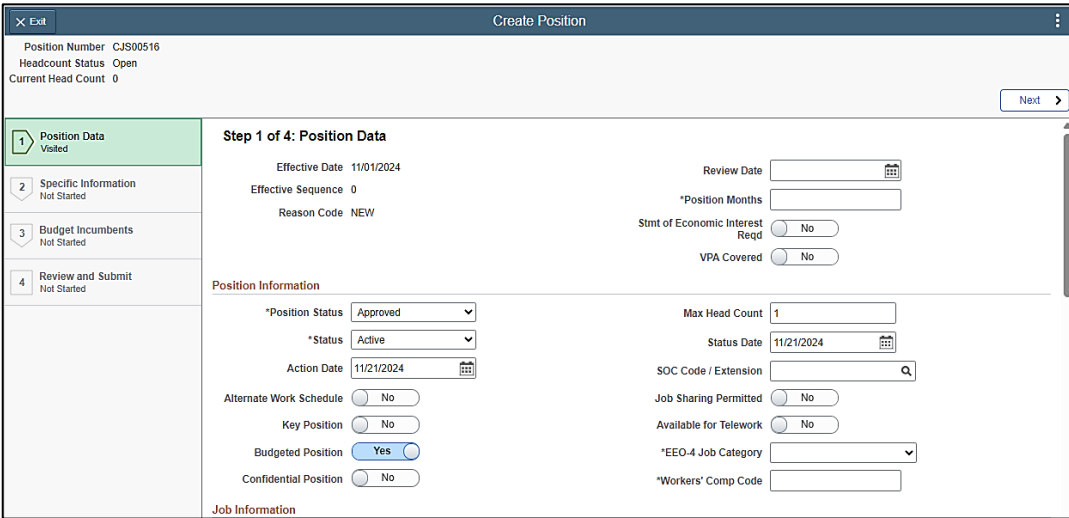
Revision History

Revision Date	Summary of Changes
12/3/2024	Baseline

Creating a Position

Use this process to create a new position in Cardinal.

Step	Action
1.	Navigate to the **Manage/Create Position** page using the following path: **NavBar > Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position**
	The **Manage/Create Position** page displays.
2.	Click the **Add** button.
	The **Create Position** page displays.
3.	Enter the applicable Position Number in the **Position Number** field.

Step	Action
4.	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: a. Greater than or equal to the effective date of the position's **Job Code** (which is maintained by DHRM) AND b. Less than or equal to the effective date of any employee job transaction(s).
ℹ	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**.
5.	Click the **Continue** button.

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

ℹ	Various fields 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 the fields on each step (in order) as some fields are dependent on others. Review the following tables for information related to each field.

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
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

Step	Action					
	Stmt 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	
*Position Status Approved	Max Head Count 1
*Status Active	Status Date 11/21/2024
Action Date 11/21/2024	SOC Code / Extension
Alternate Work Schedule No	Job Sharing Permitted No
Key Position No	Available for Telework No
Budgeted Position Yes	*EEO-4 Job Category
Confidential Position No	*Workers' Comp Code
Job Information	

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
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	Defaults to "No". Update as needed

			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	
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
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	Y	Yes/No	Indicates whether the position is available for telework	Defaults to "No". Update as needed

Step	Action				
	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	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 The default value for all job codes will be N if agency does not override the value
	Worker's Comp Code	Y	Code	The Workers' Compensation hazard code identifies the type of work being performed for the purpose of determining the agency's WC premium and claims experience modification factor	The codes are on the DHRM Worker Comp website

Job Information section screenshot:

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 job codes, see job aid titled, **HR351_Overview of SOC and Job Code Combinations**	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, 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

Step	Action				
	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
	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	Max 10-digit numeric code	Indicates the position's department	Select the appropriate Department **Note**: When changing the department for an existing position, department/position level funding may need to be established
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 clearance for the position holder as applicable	Not utilized in Cardinal
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

Step	Action
	Salary Plan Information section screenshot:

Salary Plan Information

Salary Admin Plan	SW				Grade	5

Standard Hours	40.00				Step	

Work Period	W	Q	Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

Salary Plan Information fields:
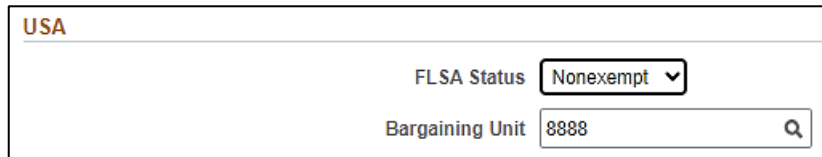
Field	Required	Value	Description	Comments
Salary Admin Plan	Y	2-digit alpha-character code	Defaults from Job Code As designated on Salary Plan table, which correlates with respective Job code. SET ID = STATE derives classified salary plan when respective job code is selected. Alternate Salary Plan requires 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
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	Update as needed

Step	Action				
				and max thresholds of the STATE Grade	
	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
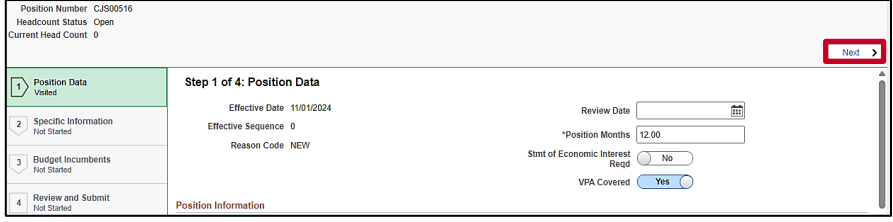
ⓘ The **Specific Information** section is not completed on this page but is utilized in the next section.

USA section screenshot:

USA

FLSA Status Nonexempt ▾

Bargaining Unit 8888 🔍
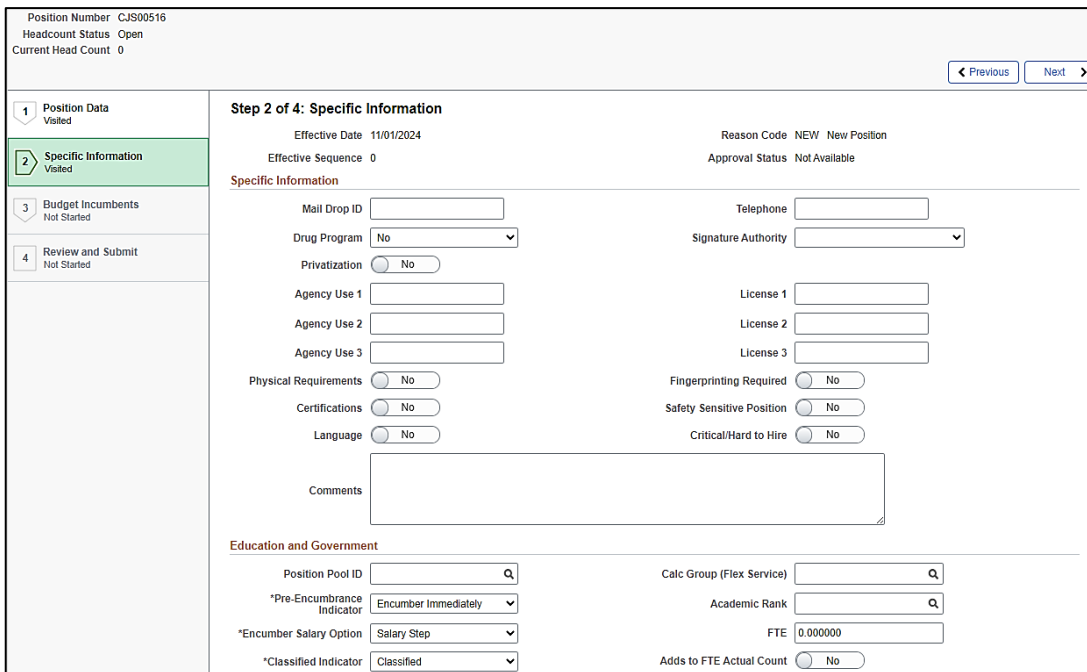
USA fields:

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"
Bargaining Unit	Y	Defaults to "8888"	This field is not utilized in Cardinal	Do not change

Step	Action
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.

ℹ️	See the table below for additional information.

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 to this position if applicable	Optionally enter as applicable. Not utilized in Cardinal
Drug Program	Y	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	Y	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	Y	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	Y	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
	Certifications	Y	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	Y	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	Y	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	Y	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

Step	Action				
	Comments	N		Free form field used to capture additional information regarding the position	Not to be used for confidential information

Education and Government section screenshot:
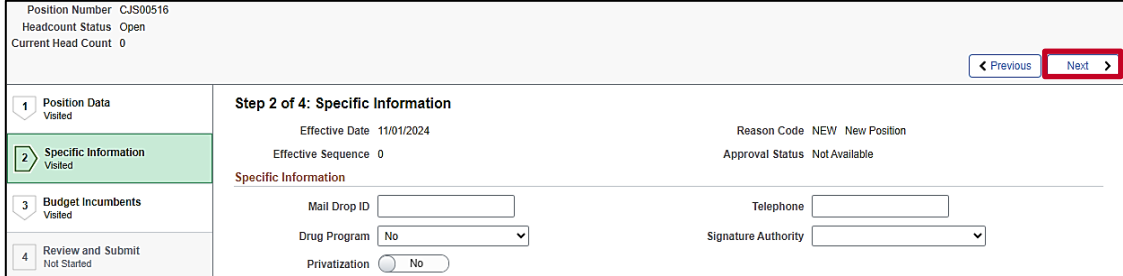
	Only the **FTE** field in the **Education and Government** section is used, and it defaults to 1. See table below for additional information for the FTE field. Do not update any fields in this section of Cardinal.
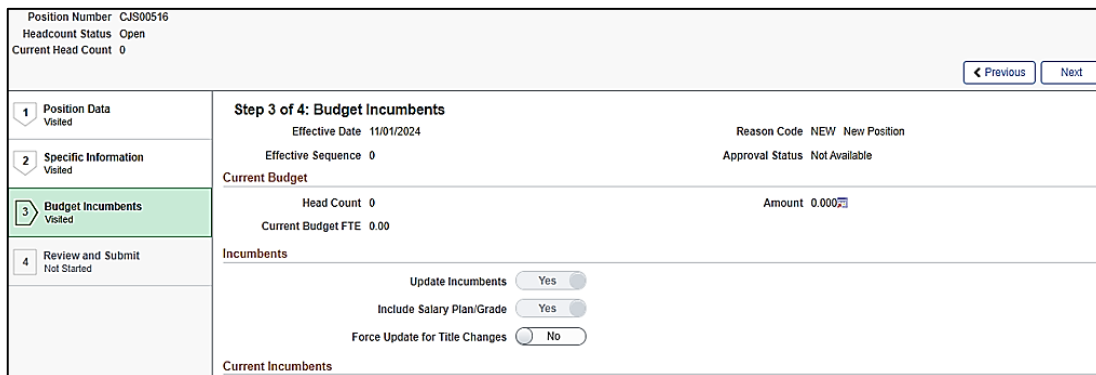
Education and Government fields:

Field	Required	Value	Description	Comments
FTE	Y	1.0 for salaried. Agency discretion for wage/hourly positions	In sync with Standard Hours field above, defaults to 1 FTE	Standard Hours and FTE should only be adjusted on job data for quasi and part-time. FTE for wage/hourly positions is agency discretion
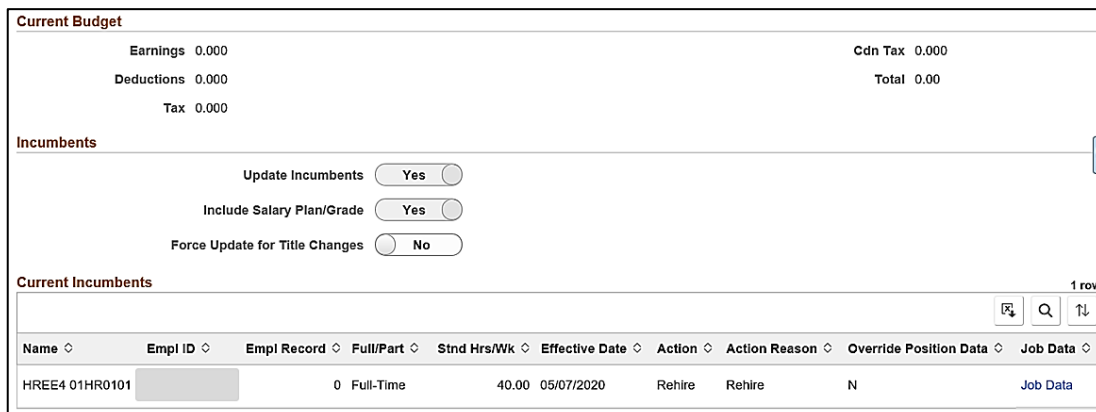
Step	Action
7.	Click the **Next** button in the top right-hand corner of the page after all required reviews and updates are completed for the **Specific Information** page.

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

ℹ️	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:
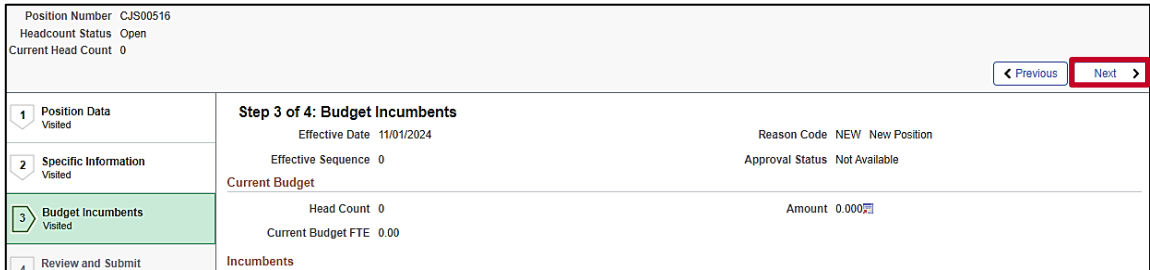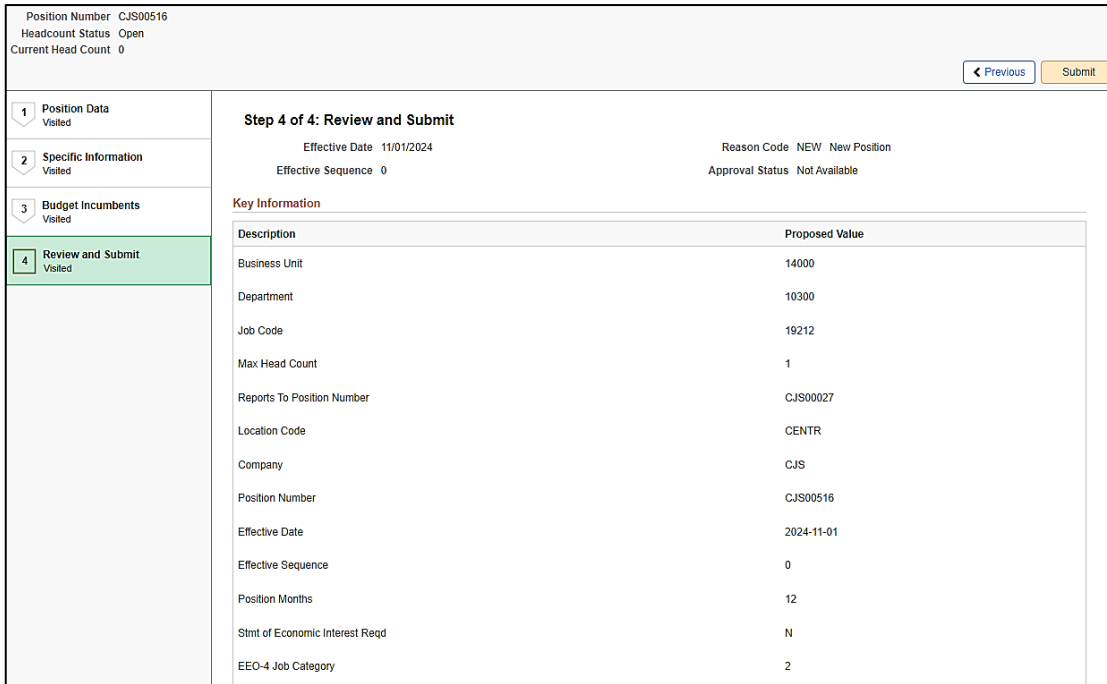
Step	Action

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"
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

8.	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.

Position Number CJS00516
Headcount Status Open
Current Head Count 0

❮ Previous   Next ❯

1	Position Data Visited	**Step 3 of 4: Budget Incumbents**	
2	Specific Information Visited	Effective Date 11/01/2024	Reason Code NEW New Position
		Effective Sequence 0	Approval Status Not Available
3	Budget Incumbents Visited	**Current Budget**	
		Head Count 0	Amount 0.000
		Current Budget FTE 0.00	
	Review and Submit	**Incumbents**	

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

Position Number CJS00516
Headcount Status Open
Current Head Count 0

◄ Previous   Submit

Step 4 of 4: Review and Submit
Effective Date 11/01/2024   Reason Code NEW New Position
Effective Sequence 0   Approval Status Not Available

Key Information
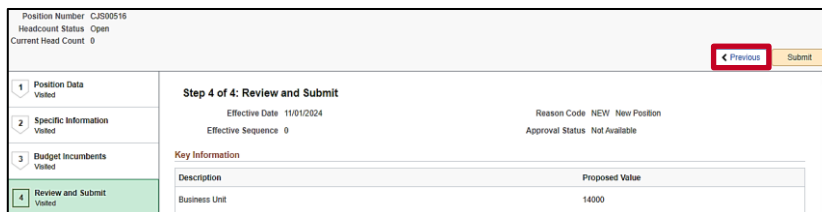
Description	Proposed Value
Business Unit	14000
Department	10300
Job Code	19212
Max Head Count	1
Reports To Position Number	CJS00027
Location Code	CENTR
Company	CJS
Position Number	CJS00516
Effective Date	2024-11-01
Effective Sequence	0
Position Months	12
Stmt of Economic Interest Reqd	N
EEO-4 Job Category	2
9.	Review the **Summary of Changes** section (**New Value** and **Old Value** column entries for field updated).
ℹ	This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking submit.
10.	If additional information is required, click the **Previous** button to navigate back to the applicable step(s).
11.	Click the **Submit** button if all updates are accurate.
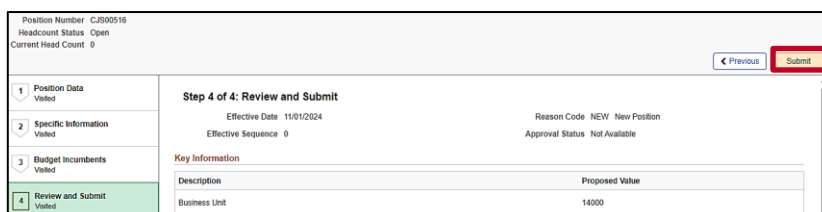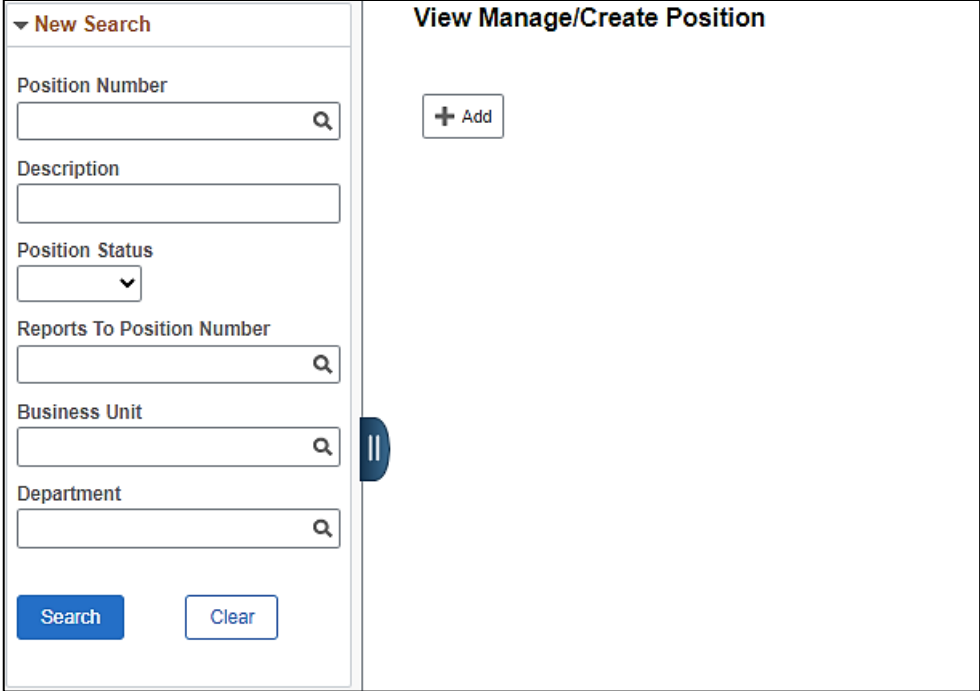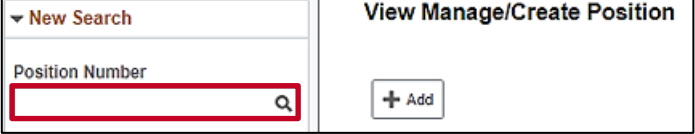
Step	Action
	The **Position Confirmation** page displays.
12.	Click the **Go to Position Details** button to return and view the updated information for the position or click the **Go to Manage/Create Position** button to create another position or search for another position and make changes.
ℹ	When creating a new position, or updating the department on an existing 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**.
ℹ	New departments must be configured by Cardinal PPS prior to being used on a position. When updating a position to a new department, a VCCC ticket (vccc@vita.virginia.gov) will need to be opened. Please be sure to include "Cardinal" in the subject line.

![Cardinal logo]
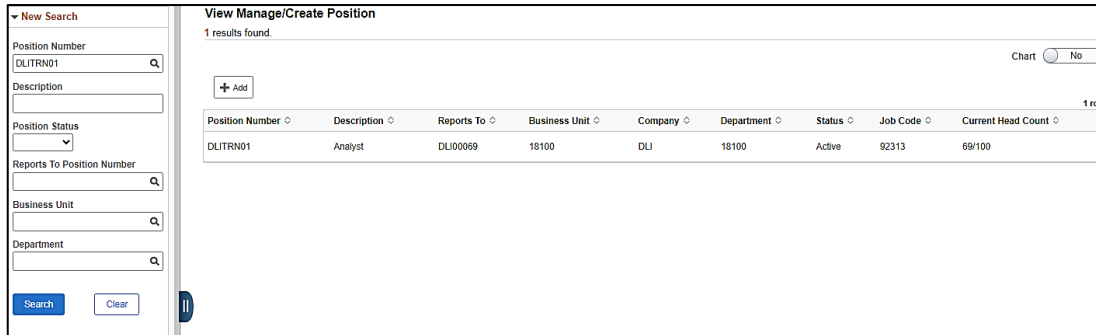
Cloning a Position

When creating positions that are identical or similar to existing positions, the clone functionality can be used.

Step	Action
1.	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.

Step	Action
2.	Enter the Position Number for the position to be cloned in the **Position Number** field.
3.	Click the **Search** button.
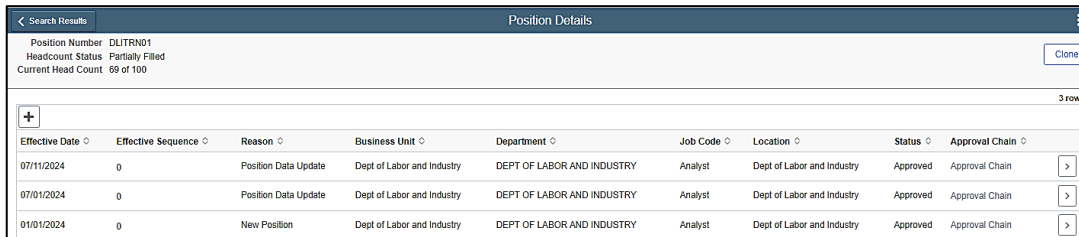
Step	Action
	The **Manage/Create Position Search** page refreshes with the search results displayed.

Step	Action
4.	Select the applicable position by clicking anywhere in the corresponding row.
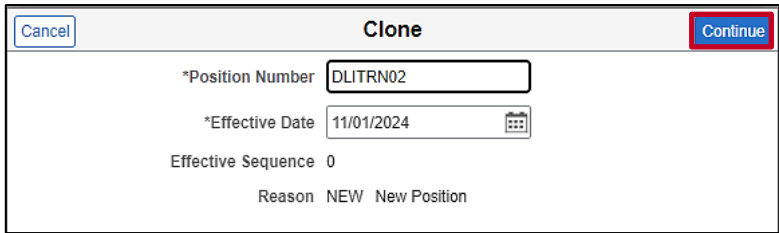
The **Position Details** page displays.
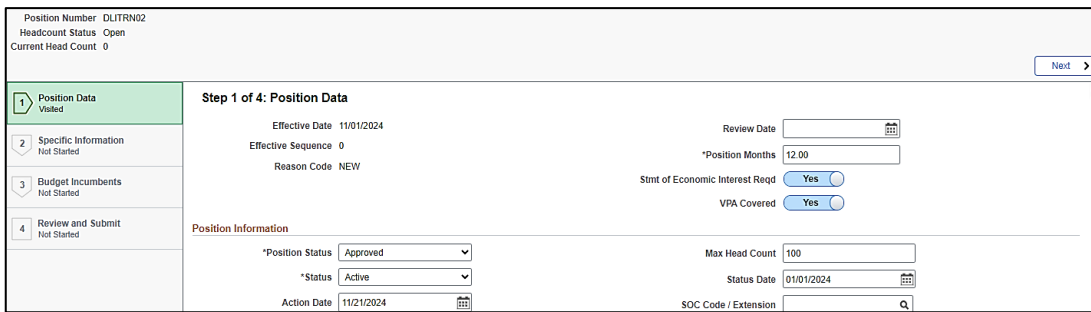
Step	Action
5.	Click the **Clone** button.
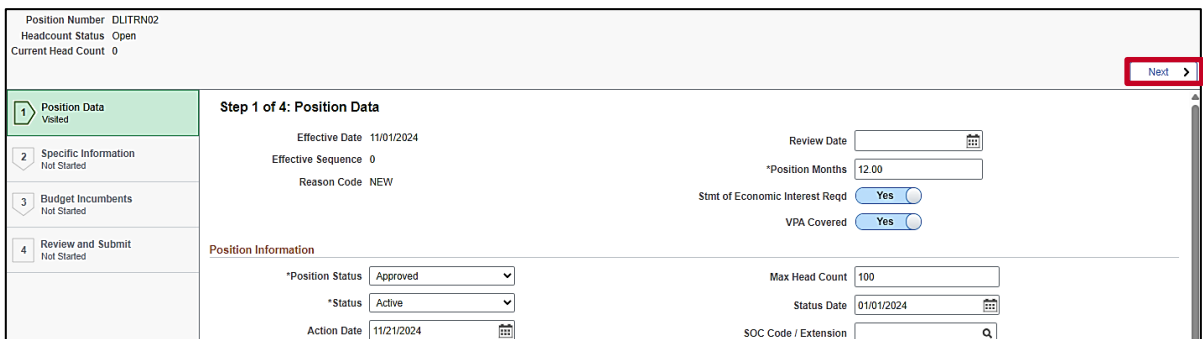
Step	Action
	The **Clone** page displays in a pop-up window. Cancel **Clone** Continue *Position Number [ ] *Effective Date [📅] Effective Sequence 0 Reason NEW New Position
6.	Enter the new Position Number in the **Position Number** field. *Position Number [ ] *Effective Date [📅] Effective Sequence 0 Reason NEW New Position
7.	Enter the new Effective Date in the **Effective Date** field. *Position Number [ ] *Effective Date [📅] Effective Sequence 0 Reason NEW New Position
ℹ	**Effective Date** field must be updated to the applicable effective date for the new position as needed using the **Calendar** icon and must be: c. Greater than or equal to the effective date of the position's **Job Code** (which is maintained by DHRM) AND d. Less than or equal to the effective date of any employee job transaction(s). 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**.
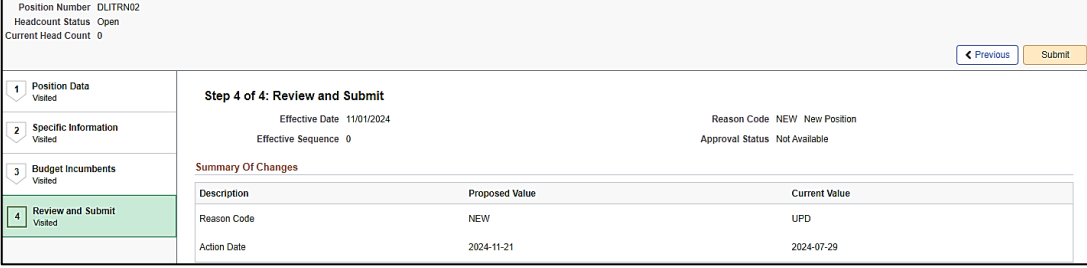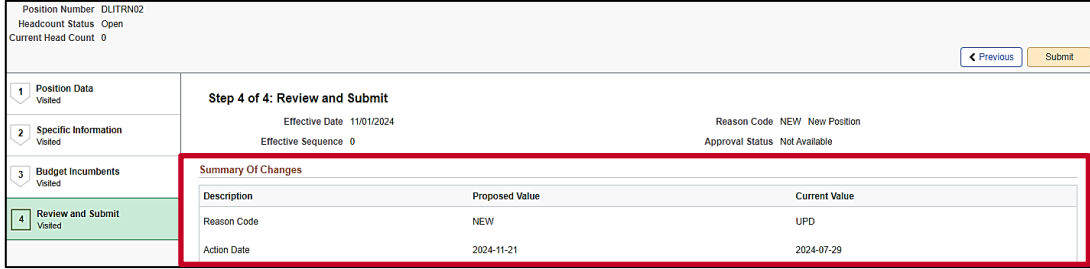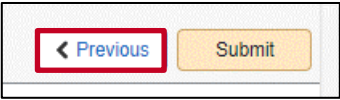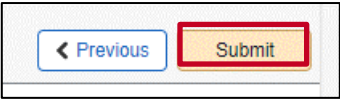
Step	Action
8.	Click the **Continue** button.

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

	The information for the position defaults based on the position from which it was cloned.
	The following link can be used to navigate to the screenshots and tables found in the **Manage Position** section of this Job Aid, which provides a brief description, important information, and dependencies (as applicable) for each field: Position Data_Header_Fields

Step	Action
10.	Click the **Next** button to navigate through Steps 1 to 4, reviewing all information and completing all necessary updates on the various position pages.

Step	Action

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

Position Number DLITRN02
Headcount Status Open
Current Head Count 0

	1 Position Data Visited	**Step 4 of 4: Review and Submit**		
	2 Specific Information Visited	Effective Date 11/01/2024		Reason Code NEW New Position
	3 Budget Incumbents Visited	Effective Sequence 0		Approval Status Not Available
	4 Review and Submit Visited	**Summary Of Changes**		

Description	Proposed Value	Current Value
Reason Code	NEW	UPD
Action Date	2024-11-21	2024-07-29

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

Position Number DLITRN02
Headcount Status Open
Current Head Count 0

Previous | Submit

1 Position Data Visited	**Step 4 of 4: Review and Submit**
2 Specific Information Visited	Effective Date 11/01/2024 Reason Code NEW New Position
3 Budget Incumbents Visited	Effective Sequence 0 Approval Status Not Available
4 Review and Submit Visited	**Summary Of Changes**

Description	Proposed Value	Current Value
Reason Code	NEW	UPD
Action Date	2024-11-21	2024-07-29

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

| 12. | If additional information is required, click the **Previous** button, and navigate back to the applicable step(s).

[◀ Previous] [Submit] |
|-----|---|

| 13. | Click the **Submit** button after verifying all information.

[◀ Previous] [Submit] |
|-----|---|

Step	Action
	The **Position Confirmation** page displays.

Position Confirmation

✔ The New Position Number DLITRN02 has been successfully created.

Position Number DLITRN02
Headcount Status Open
Current Head Count 0 of 100

[Go to Position Details] [Go to Manage/Create Position]

Step	Action
ℹ	**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**. **Note**: New departments must be configured by Cardinal PPS prior to being used on a position. When updating a position to a new department, a VCCC ticket (vccc@vita.virginia.gov) will need to be opened. Please be sure to include "Cardinal" in the subject line.

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. It is important to review the effective date of an employee's highest job data row.

Step	Action
1.	Navigate to the **Manage Position** page using the following path: **NavBar > Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position**

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

Step	Action
ℹ️	Users will only see approved positions granted by their security access.
2.	Search for the applicable position using the fields on the left sidebar. **▼ New Search** **Position Number** [_____ 🔍] **Description** [_____] **Position Status** [____ ▼] **Reports To Position Number** [_____ 🔍] **Business Unit** [_____ 🔍] **Department** [_____ 🔍] [Search] [Clear] **View Manage/Create Position** [➕ Add]
ℹ️	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.
3.	Click the **Search** button. [Search] [Clear]

![Cardinal logo]

Step	Action
	The **Manage/Create Position** page refreshes and the search results display.
4.	Select the applicable position by clicking anywhere in the corresponding row. The **Position Details** page displays.
5.	Click the **Expand** icon (**>**) at the end of the row for view only pages of position.

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

Position Number DLI00010
Headcount Status Filled
Current Head Count 1 of 1

Effective Date	05/25/2024	Review Date	
Effective Sequence	0	Position Months	12.00
Reason	RUP Job Reclass Upward	Stmt of Economic Interest Reqd	No
Approval Status	Approved		
		VPA Covered	Yes

Position Information

Position Status	Approved	Max Head Count	1
Status	Active	Status Date	09/21/2022
Action Date	05/13/2024	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	Yes	Workers' Comp Code	8720

Step	Action
6.	Scroll down to 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		
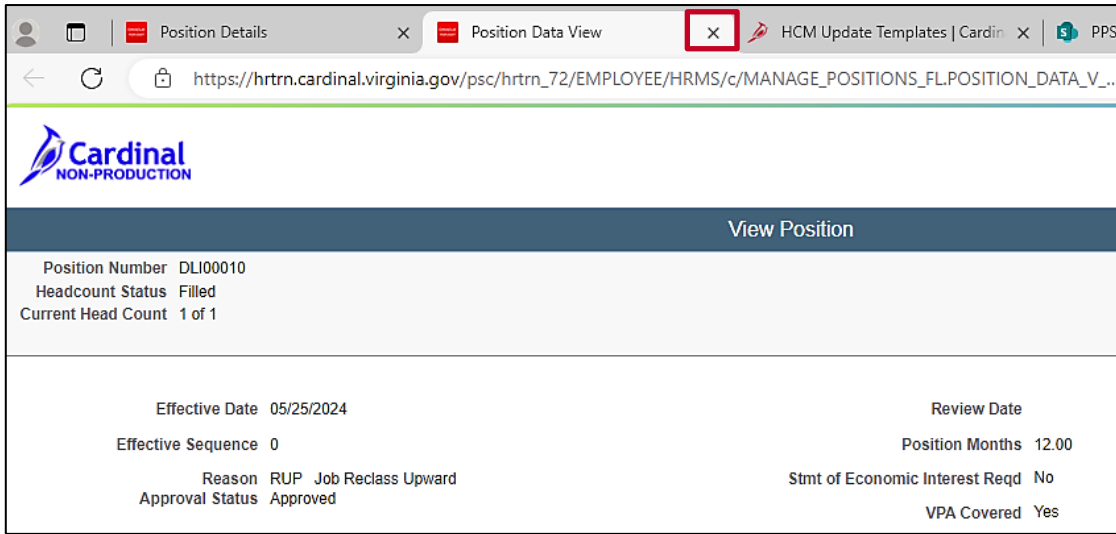
Current Incumbents

1 row

Name	Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
JOHN DOE		0	Full-Time	40.00	06/25/2024	Pay Rate Change	New KSAs	N	Job Data

CI Exceptions
▶ Summary of Changes
▶ Attachments
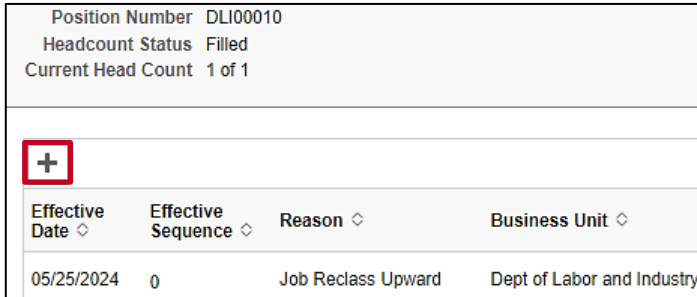
Step	Action
7.	The job data of the current employee in the position is displayed here. Review the following fields in the **Current Incumbents** section.

    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

► 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		0	Full-Time	40.00	06/25/2024	Pay Rate Change	New KSAs	N	Job Data

CI Exceptions
► Summary of Changes
► Attachments

Step	Action
8.	Click the **X** by the **Position Data View** tab to close out this tab.
	The **Position Details** page displays.
9.	Click the **Insert a New Row** icon (**+**) to create a new effective dated row in order to make a change to the position.

Step	Action
	The **Request Details** page displays in a pop-up window. **Request Details** Cancel Continue *Effective Date [ ] Effective Sequence 0 Reason Code [🔍]
10.	Enter the **Effective Date** of the position change. Cancel **Request Details** Continue *Effective Date [11/01/2024 📅] Effective Sequence 0 Reason Code [🔍]
11.	Select the applicable **Reason Code**. Cancel **Request Details** Continue *Effective Date [11/01/2024 📅] Effective Sequence 0 Reason Code [RTC 🔍] Reports To/Supv Change
12.	Click the **Continue** button. Cancel **Request Details** Continue *Effective Date [11/01/2024 📅] Effective Sequence 0 Reason Code [RTC 🔍] Reports To/Supv Change

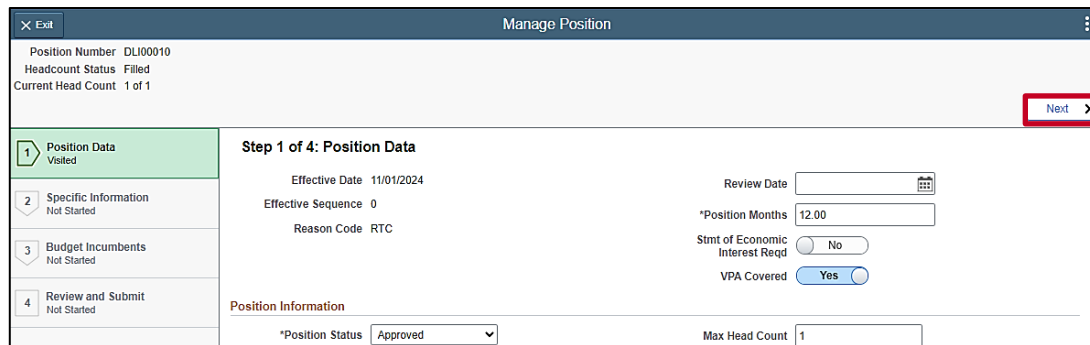| Step	Action
	The **Manage Position** page displays with the **Position Data** Step 1 of 4 displayed by default.
ℹ	When updating the department of an existing position, Position/Department funding may need to be assigned for the new position/department combination. For more information on assigning 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**. The following link can be used to navigate to the screenshots and tables found in the **Manage Position** section of this Job Aid, which provides a brief description, important information, and dependencies (as applicable) for each field: Position Data_Header_Fields
13.	Click the **Next** button to navigate through Steps 1 to 4, reviewing all information and completing all necessary updates on the various position pages.
	The **Create Position** page displays with the **Review and Submit** Step 4 of 4 displayed.

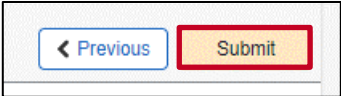| Step	Action
14.	Review **Summary of Changes** section (**Proposed Value** and **Current Value** column entries for field updated).
(i)	This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking submit.
15	If additional information is required, click the **Previous** button, and navigate back to the applicable step(s).
16.	Click the **Submit** button after verifying all information.

The **Position Confirmation** page displays.