



CENTRALIZED ACCOUNTING & PAYROLL/PERSONNEL SYSTEM

CAPPS Desk Aid

Managing Positions

Note: This Desk Aid was written to the specifications of CAPPS Central Agency modules and may not reflect the unique process variations implemented by individual or non-Central agencies.

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Managing Positions

Overview

The CAPPS Manage Positions module allows agencies to create, update, clone, inactivate and reactivate agency position numbers on the agency's CAPPS position table.

Position numbers serve as important data holders that carry information (such as salary plan assignment, job code, assigned standard hours and FLSA indicator) to employee Job Data when the employee record is created or updated. In addition, position numbers must be created on the agency position table before they can be used to hire employees or contingent workers. Once created, positions must be updated in Manage Position if certain features of the employee's position assignment change (such as a change in job classification code, department ID, supervisory assignment or location).

Terms and Definitions

Term	Description
BUSINESS UNIT	A business level between the company and departments that identifies divisions for reporting and operations. Business Unit values may include the agency number suffixed with two additional characters. (ex. 30400)
Classified Position	A position using a job code that is part of the State Classification Plan with defined job codes, state classification titles, and assigned salary plans with specific minimum and maximum salary ranges. The classified designation is set up on the agency job code table when the classified job code is created.
Cloning	This process copies the characteristics of an existing position to create a new position with a new position number. Any data that doesn't apply to the new position can be manually changed.
COMPANY CODE	In CAPPS, this is the agency number.
DEPARTMENT ID	Every position and job is assigned to a department. Departments are controlled by Business Unit and SetID. Agencies create departments in their agency Department Table and assign departments to specific positions as the positions are created or updated.
Incumbent Data	When an employee is assigned to a position, the employee ID, Name and a Job Data link are displayed as Incumbent Data in Position Management. The position headcount adjusts when an employee is assigned to a position, but any changes to the incumbent's job record only affects the employee's job record and not the position.
JOB CODE	Job codes contain job classification titles, default compensation ranges, salary plan assignments and applicable extended attributes for each job in CAPPS. The approved job codes, associated salary plans and salary ranges as established by the State of Texas Classification Plan are maintained by the Texas State Auditor in CAPPS under the SETID of TEXAS table.

Each agency can add specific functional job codes under its agency SETID, but this process does not change the underlying job code assignment or salary plan.

Agencies may create functional job codes where there is a need to distinguish different job duties or categories of employees who share a common job code.

Term	Description
FUNCTIONAL JOB CODE	A combination of the approved statewide four (4) character job code and a two (2) character suffix that is defined by the agency. (i.e., 0055XX where XX is the agency specific values).
LOCATION CODES	Created and maintained by the agency on the CAPPS Location Code Table. Location codes contain specific agency business location details (such as address, office floor location and mail codes).
Non-Pay Impacting	Position-related data changes that include Reports-To, Department and Location changes. After the changes are made in Position Data, a new, effective-dated row will be added on Manage Job for the employee. The effective dates on both the Position Data and Job Data records will match.
Pay Impacting	Position-related data changes that update position values that can impact pay (such as job code and Standard Hour changes). These changes require a companion transaction to be entered on Manage Job to complete the entire transaction and pull the position changes to Manage Job.
Position	Created and maintained by agencies on the CAPPS agency Position Table and are used to capture and track details on agency jobs. Positions are assigned unique numbers in CAPPS for agency tracking and maintenance of agency positions and for assignment to agency employees.
Position Data	Any information related to a specific position (such as job code, Department ID, Salary Plan or Title).
POSITION NUMBER	A unique number assigned to an agency position that is generated in CAPPS at the time the position is created.
Sequencing	A process allowing users to add multiple update rows for a specific position using the same effective date, and each same effective-dated row added to the position receives a sequence number in ascending order.
Unclassified Position	A position that is defined by the agency and is not a part of the State Classification Plan. The unclassified designation is set up on the agency job code table when the unclassified job code is created.

The following sections provide steps and screenshots to assist in creating new positions, updating existing positions, cloning positions, inactivating positions that will no longer be in use and reactivating position numbers, as necessary.

Note: When creating or updating positions, a **JOB CODE** is required to be assigned to the position. If a job code is unavailable on the **JOB CODE** selection menu when the position is being created or updated, the job code must first be created on your agency job code table.

Creating a New Position

Navigation
Dashboard: Workforce Administration; **Tile:** Manage Human Resources, Manage Position
NavBar: Menu, Organizational Development, Position Management, Manage Position

1. Select **Add New**.

2. Enter the position **EFFECTIVE DATE**.

3. Select **Add**.
 The **Position Data** page displays.

- Verify all default field values and update, if necessary.

Note: The system defaults the values for the following fields:

- REASON CODE: **New**
- FILED STATUS: **Approved**
- STATUS: **Active**

- Enter the BUSINESS UNIT (in the *Job Information* section).
- Select the JOB CODE.
- Select REGULAR or TEMPORARY.
- Select FULL TIME or PART TIME.
- Select the REGULAR or TEMPORARY indicator.
- Select the FULL TIME or PART TIME indicator.
- Select the DEPARTMENT and LOCATION (in the *Work Location* section).

The screenshot shows the 'Create Position' form with the 'Work Location' section highlighted. Red arrows point to the following fields: 'Reg Region' (USA), 'Department' (2000), and 'Location' (5000). Other visible fields include 'Reg/Temp/Regular' (Regular), 'Regular Shift' (Not Applicable), 'Title' (Accountant VI), 'Short Title' (Acc 6), 'Description' (Accountant VI), 'Company' (T32 Texas Baseline Agency T32), 'Dist-Line', 'Security Clearance', 'Reports To' (00000000), 'Supervisor Level' (Manager IV), 'Salary Admin Plan' (B), 'Standard Hours' (40.00), 'Grade' (24), 'Step', 'Work Period' (Weekly), 'Specific Information' (Mail Drop ID, Health Certificate, Telephone, Signature Authority), 'FLSA Status' (Administrative), and 'Hazardous Duty' (No).

- Enter the supervisor’s position number in the REPORTS-TO field.

Note: The SUPERVISOR LEVEL field is an optional field and can be populated at the user’s discretion.

- Adjust the hours in the STANDARD HOURS field as necessary (in the *Salary Plan Information* section) to match the employee’s work schedule.

Note: The WORK PERIOD field defaults to **Weekly**.

- Verify the default value fields.

Note: SALARY ADMIN PLAN, FLSA STATUS and the HAZ DUTY ELIGIBLE indicator default from the values on the agency Job Code table for the job code selected. To change these values at the position level, first update these values on the agency’s job code table.

- Select **Next**.

The **Additional Information** page displays.

The screenshot shows the 'Create Position' form with the 'Additional Information' section displayed. A red arrow points to the 'Additional Information' tab in the left sidebar. The main form area shows 'Step 2 of 6: Additional Information' with fields for 'Effective Date' (11/01/2024), 'Effective Sequence' (0), 'Reason Code' (NEW - New Position), 'Approval Status' (Not Available), '*Classified Indicator' (Classified), 'FTE' (1.0), and 'Adds to FTE Actual Count' (Yes).

16. Verify the position data is populated.

Note: The CLASSIFIED INDICATOR field defaults from the setting on your agency's Job Code table for the selected job code. If the position is classified, the indicator displays **Classified**. If the position is unclassified, this indicator displays **Unclassified**.

17. Adjust the FTE field as necessary.

*For example, a full-time employee with a 40-hour weekly schedule is equivalent to 1.0 FTE. If the position adds to the agency's FTE count, the FTE field must **not** be 0.*

18. Toggle the **Adds to FTE Actual Count** indicator to **Yes** if the position adds to your agency's FTE count.

19. Select **Next**.

The **Budget Incumbents** page displays.

20. Review field values for accuracy.

Note: If the position will be filled, toggle the UPDATE INCUMBENTS indicator to **Yes** after the position number is submitted and saved.

21. Select **Next**.

The **Position and Reporting details** page displays.

22. Review all data for accuracy.

Updating Existing Position

Navigation

Dashboard: Workforce Administration; **Tile:** Manage Human Resources, Manage Position
NavBar: Menu, Organizational Development, Position Management, Manage Position

1. Enter the POSITION NUMBER.

The screenshot shows the 'Manage/Create Position' search criteria form. The 'Position Number' field is set to '00005729'. The 'Include History' checkbox is checked. A 'Search' button is visible at the bottom.

2. Select the **Include History** checkbox.
3. Select **Search**.
4. Select **Add Row** to insert a new, effective-dated row.

The screenshot shows the 'Position Details' table with the following data:

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Reports To
09/01/2024	0	UPD-Update Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPS Way	
09/01/2023	0	UPD-Update Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPS Way	
09/01/2022	0	UPD-Update Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPS Way	
09/01/2021	0	UPD-Update Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPS Way	
09/01/2020	0	UPD-Update Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPS Way	
09/01/2019	0	NEW-New Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPS Way	

5. Select or enter the EFFECTIVE DATE.

The screenshot shows the 'Request Details' form. The 'Effective Date' is '12/01/2024', 'Effective Sequence' is '0', and 'Reason Code' is 'UPD'.

Note: The EFFECTIVE SEQUENCE defaults to 0 if this is the only row using this effective date.

6. Enter **UPD** in the REASON CODE field.
7. Select **Continue**.

The **Position Data** page displays.

The screenshot shows the 'Position Data' page. The 'Position Data' tab is selected in the sidebar. The main content area displays 'Step 1 of 5: Position Data' with the following information:

- Effective Date: 12/01/2024
- Effective Sequence: 0
- Reason Code: UPD-Update Position
- Approval Status: Not Available
- Max Head Count: 1
- Status Date: 02/11/2020
- Job Sharing Permitted: No
- Available for Network: No
- Business Unit: 08400
- Job Code: 1623
- Director IV
- FullPart Time: Full-Time
- Unit Code: Q
- Short Title: Director I
- Description: Director IV
- Reg Region: USA
- Department: 1000
- Location: 1000
- Reports To: 00000000
- Supervisor Level: Q
- Company: 084 Agency 084
- DistLine: Q
- Security Clearance: Q

Note: More than one position update row using the same effective date can be entered on the position data. If another position update row is added to the position data using the same effective date, that row receives a sequence number in ascending order.

*Example: The first position update row with a Sept. 1, 2024 effective date has an **EFFECTIVE SEQUENCE** of 0. The next position update row for that position with a Sept. 1, 2024 effective date has an **EFFECTIVE SEQUENCE** of 1.*

8. Update any position-specific fields as necessary (such as JOB CODE, DEPARTMENT, LOCATION, REPORTS-TO POSITION NUMBER or STANDARD HOURS).

9. Select **Next**.

The **Additional Information** page displays.

10. Make changes to FTE as necessary.

11. Select **Next**.

The **Budget Incumbents** page displays, showing the current incumbent in the *Current Incumbents* section, including a hyperlink to view employee Job Data in the *Job Data* column.

12. Make changes as necessary.

13. Select **Next**.

The **Position and Reporting details** page displays.

14. Review data for accuracy.

15. Select **Next**.
The **Review and Submit** page displays.

Manage Position
Position Number: 00005729
Headcount Status: Filled
Current Head Count: 1 of 1

Step 5 of 5: Review and Submit
Effective Date: 12/01/2024
Effective Sequence: 0
Reason Code: LPD-Update Position
Approval Status: Not Available

Summary Of Changes

Description	Proposed Value	Current Value
Description	Director IV	Mgr II
Short Description	Director I	Mgr II
Action Date	02/14/2025	09/30/2024
Department	1000	5900
Job Code	1623	1801
Reports To Position Number	00009908	
Monday	8	0
Tuesday	8	0
Wednesday	8	0
Thursday	8	0
Friday	8	0
FLSA Status	E	P
Notes Grade	09	20

16. Review the data for accuracy.
 17. Select **Previous** to make data changes before submitting.
 18. Select **Submit** when all data changes are complete.
- A warning message displays regarding changes to incumbent data and changes to position data.

Warning – No updates will be made to incumbent data.
Position data related to job code, compensation, company, business, unit, reg/temp, full/part-time, standard hours or classified indicator has been changed.
Incumbent job data will not be automatically updated. If the change is to be applied to incumbent job data, continue Position Data save process then proceed to Workforce Administration > Manage Human Resources > Manage Job and enter the change there.
Press OK to continue save process.

19. Select **OK**.
A confirmation page displays, indicating the position number was successfully updated.

✔ The Position Number 00005729 has been successfully updated.

Position Number: 00005729
Headcount Status: Filled
Current Head Count: 1 of 1

20. Select **Go to Position Details** to view the updated position row.

Position Details
Position Number: 00005729
Headcount Status: Filled
Current Head Count: 1 of 1

Effective Date 1:	Effective Sequence 1:	Reason 1:	Business Unit 1:	Department 1:	Job Code 1:	Location 1:	Reports To 1:			
12/01/2024	0	LPD-Update Position	Agency 084 BU	Executive Administration	Director IV	111 CAPPs Way	00009908	<input checked="" type="checkbox"/>	<input type="checkbox"/>	>
09/01/2024	0	LPD-Update Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPs Way		<input checked="" type="checkbox"/>	<input type="checkbox"/>	>
09/01/2023	0	LPD-Update Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPs Way		<input checked="" type="checkbox"/>	<input type="checkbox"/>	>
09/01/2022	0	LPD-Update Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPs Way		<input checked="" type="checkbox"/>	<input type="checkbox"/>	>
09/01/2021	0	LPD-Update Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPs Way		<input checked="" type="checkbox"/>	<input type="checkbox"/>	>
09/01/2020	0	LPD-Update Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPs Way		<input checked="" type="checkbox"/>	<input type="checkbox"/>	>
09/01/2019	0	NEW-New Position	Agency 084 BU	Enforcement	Mgr II	111 CAPPs Way		<input checked="" type="checkbox"/>	<input type="checkbox"/>	>

7 rows

Note: CAPPS automatically updates the employee record with an update row on **Manage Job** when a non-pay-impacting change is entered on **Position** (such as an update to position location or reports-to supervisor assignment).

21. Navigate to the employee’s **Job Data** page in CAPPS **Manage Job** to verify that these rows have been written to the employee’s job data.

If a pay-impacting change is entered on the position record, CAPPS will not automatically update the employee record. Manual updates must be entered for the employee on Manage Job.

Correcting a Position Row

Changing position data in the correct history mode overwrites any previous information on that position row and may impact employee job records. Once a position row is corrected, review employee job records for any Job Data corrections that are necessary.

Note: Agencies may correct position data records without restriction but may only correct employee Job Data for current month plus one month back. Position data changes that require corresponding corrections to employee Job Data beyond this timeframe may require a Letter of Authorization (LOA) to correct.

Navigation

Dashboard: Workforce Administration; **Tile:** Manage Human Resources, Manage Position

NavBar: Menu, Organizational Development, Position Management, Manage Position

1. Enter the POSITION NUMBER .

2. Select the **Correct History** checkbox.
3. Select **Search**.
4. Select the pencil icon on the row to be edited.

Effective Date %	Effective Sequence %	Reason %	Business Unit %	Department %	Job Code %	Location %	Reports To %	
08/10/2024	0	UPD-Update Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734	[Pencil Icon]
08/10/2023	0	UPD-Update Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734	[Pencil Icon]
08/10/2022	0	UPD-Update Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734	[Pencil Icon]
08/10/2021	0	UPD-Update Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734	[Pencil Icon]
08/10/2020	0	UPD-Update Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734	[Pencil Icon]
08/10/2019	0	NEW-New Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734	[Pencil Icon]

5. Enter the correct date in the EFFECTIVE DATE field if the effective date needs to be corrected **–or–** Leave EFFECTIVE DATE as-is.

6. Select **Continue**.
The **Position Data** page displays.

Manage Position
Position Number: 00005724
Headcount Status: Filled
Current Head Count: 1 of 1

Step 1 of 5: Position Data
Effective Date: 09/01/2024
Reason Code: LFD-Update Position
Approval Status: Not Available

Position Information
 *Head Status:
 *Status:
 Action Date: 09/30/2024
 Key Position: No
 Budgeted Position: Yes
 Confidential Position: No

Job Information
 *Business Unit: 0000 Agency 004 BU
 *Job Code: 0114 Accountant II
 *Regular/Temporary: Regular
 *Regular Shift: Not Applicable
 *Title: Accountant II

Work Location
 *Reg Region: USA United States
 *Department: 0000 Enforcement
 Location: 1000 111 CAPPS Way
 Reports To: 00005724 Human Resources Sector 01
 Supervisor Level:

Salary Plan Information
 *Full/Part Time: Full-Time
 Union Code:
 *Start Title: Accountant II
 Description: Accountant II
 Company: 004 Agency 004
 *Date Hire:
 Security Clearance:

7. Enter the correcting data as necessary.
8. Select **Next** to move through the position pages.
9. Review the **Current Value** and the **Proposed Value** columns on the **Review and Submit** page to verify the accuracy of the changes made.

Manage Position
Position Number: 00005724
Headcount Status: Filled
Current Head Count: 1 of 1

Step 5 of 5: Review and Submit
Effective Date: 09/01/2024
Reason Code: LFD-Update Position
Approval Status: Not Available

Summary Of Changes

Description	Proposed Value	Current Value
Department	0000	0000
Monday	0	0
Tuesday	0	0
Wednesday	0	0
Thursday	0	0
Friday	0	0

10. Select **Submit** if all data is correct.
A confirmation page displays advising that the position was successfully updated.

Position Confirmation

✓ The Position Number 00005724 has been successfully updated.

Position Number: 00005724
Headcount Status: Filled
Current Head Count: 1 of 1

[Go to Position Details](#) [Go to Manage/Create Position](#)

11. Select **Go to Position Details** to view the updated row.

Position Details
Position Number: 00005724
Headcount Status: Filled
Current Head Count: 1 of 1

Effective Date %	Effective Sequence %	Reason %	Business Unit %	Department %	Job Code %	Location %	Reports To %	# Rows
09/01/2024	0	LFD-Update Position	Agency 004 BU	Human Resources	Accountant II	111 CAPPS Way	00005724	1
09/01/2023	0	LFD-Update Position	Agency 004 BU	Enforcement	Accountant II	111 CAPPS Way	00005724	1
09/01/2022	0	LFD-Update Position	Agency 004 BU	Enforcement	Accountant II	111 CAPPS Way	00005724	1
09/01/2021	0	LFD-Update Position	Agency 004 BU	Enforcement	Accountant II	111 CAPPS Way	00005724	1
09/01/2020	0	LFD-Update Position	Agency 004 BU	Enforcement	Accountant II	111 CAPPS Way	00005724	1
09/01/2019	0	NEW-New Position	Agency 004 BU	Enforcement	Accountant II	111 CAPPS Way	00005724	1

Note: If a position row is corrected and there is a later-dated update row on position data, each later-dated row must be evaluated to determine if the data that was corrected must also be carried forward to later-dated position rows.

For example, if an employee's department assignment was changed effective 9/1/2023 but the change was not processed before the 9/1/2024 position row was added, the 9/1/2024 row may also need to be corrected to carry forward the department assignment change.

12. Follow the steps above to correct the later-dated position rows if the corrected data was carried forward.

Note: Department assignment is a change that ordinarily results in a row automatically writing to the employee's Job Data and pulls the department change to employee job data.

Cloning a Position

Cloning an existing position may save time and effort when a new position needs to be created since the new position details will be the same as the original position. However, individual data values on the cloned position can be manually changed as necessary.

Navigation Path

Dashboard: Workforce Administration; **Tile:** Manage Human Resources, Manage Position

NavBar: Menu, Organizational Development, Position Management, Manage Position

1. Enter the POSITION NUMBER of the position to be cloned.

2. Select the **Include History** checkbox.
3. Select **Search**.
4. Select **Clone** near the top right corner of the page.

Effective Date %1	Effective Sequence %1	Reason %1	Business Unit %1	Department %1	Job Code %1	Location %1	Reports To %1			
09/01/2024	0	UPD-Update Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734			
09/01/2023	0	UPD-Update Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734			
09/01/2022	0	UPD-Update Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734			
09/01/2021	0	UPD-Update Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734			
09/01/2020	0	UPD-Update Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734			
09/01/2019	0	NEW-New Position	Agency 084 BU	Enforcement	Accountant II	111 CAPPS Way	00005734			

5. Enter the position EFFECTIVE DATE.

Note: The REASON value defaults to **New Position**.

- Select **Continue**.
The *Position Data* menu displays on the left side of the page.

- Enter any specific position data value changes as necessary.
For example, if the cloned position will retain all the same position details as the original, but will have a different department assignment, update the department assignment in the DEPARTMENT field.
- Enter the updated data as necessary.
- Select **Next** to move through the position pages.
- Review the changes on the **Review and Submit** page to verify accuracy.

Description	Proposed Value	Current Value
Position Code	NEB	UPD
Action Date	03/13/2024	06/30/2024
Department	1000	8000
Monday	0	0
Tuesday	0	0
Wednesday	0	0
Thursday	0	0
Friday	0	0
Supervisor Level	00000000	

- Select **Submit** to save the cloned position and generate a new position number.
A warning message displays regarding changes to incumbent data and changes to position data.

- Select **OK**.
- Make note of the newly-created position number and select **Go to Position Details** to view the new position entry in **Manage Position**.

The position was cloned and a new position number and position row entry were successfully created.

Effective Date %	Effective Sequence %	Sequence %	Business Unit %	Department %	Job Code %	Location %	Reports To %
11/13/2024	0		NEB-New Position	Agency 004 RU	Executive Administration	Accountant I	110 CAPPS 100

Inactivating a Position

Once a position is created on the agency position table, the position record cannot be deleted. However, positions can be inactivated.

If a specific position number is not needed or will no longer be used, the status can be updated to inactive, and it will not be available for assignment. The agency must ensure that the date a position is made inactive does not occur during any periods that the position was assigned to an agency employee. The CAPPS position module will not process an inactivation row while the position is assigned to an employee.

Navigation

Dashboard: Workforce Administration; **Tile:** Manage Human Resources, Manage Position

NavBar: Menu, Organizational Development, Position Management, Manage Position

1. Enter the POSITION NUMBER of the position to be inactivated.

2. Select the **Include History** checkbox.
3. Select **Search**.
4. Select **Add Row**.

Effective Date 1:	Effective Sequence 1:	Reason 1:	Business Unit 1:	Department 1:	Job Code 1:	Location 1:	Reports To 1:
09/01/2024	0	UPD-Update Position	Agency 084 BU	Executive Administration	Admin Assnt II	111 CAPPS Way	
09/01/2023	0	UPD-Update Position	Agency 084 BU	Executive Administration	Admin Assnt II	111 CAPPS Way	
09/01/2022	0	UPD-Update Position	Agency 084 BU	Executive Administration	Admin Assnt II	111 CAPPS Way	
09/01/2021	0	UPD-Update Position	Agency 084 BU	Executive Administration	Admin Assnt II	111 CAPPS Way	
09/01/2020	0	UPD-Update Position	Agency 084 BU	Executive Administration	Admin Assnt II	111 CAPPS Way	
09/01/2019	0	NEW-New Position	Agency 084 BU	Executive Administration	Admin Assnt II	111 CAPPS Way	

5. Enter the EFFECTIVE DATE.
6. Enter **UPD** in the REASON CODE field.

7. Select **Continue**.
The **Position Data** page displays.

8. Select **Inactive** from the STATUS dropdown menu.

The screenshot shows the 'Manage Position' form at Step 1 of 5: Position Data. The 'Status' dropdown menu is highlighted with a red arrow and set to 'Inactive'. Other fields include Effective Date (12/01/2024), Action Date (02/13/2025), and various checkboxes for Key Position, Budgeted Position, and Confidential Position.

9. Select **Next** to move through the position pages until the **Review and Submit** page displays.

The screenshot shows the 'Manage Position' form at Step 5 of 5: Review and Submit. The 'Review and Submit' step is highlighted with a red arrow. A 'Summary Of Changes' table is visible, showing the proposed and current values for the position.

Description	Proposed Value	Current Value
Status as of Effective Date	I	A
Action Date	02/13/2025	09/30/2024

10. Review the *Current Value* and *Proposed Value* columns for accuracy.

11. Select **Submit**.

12. A warning message displays regarding changes to incumbent data and changes to position data.

Warning -- No updates will be made to incumbent data. Position data related to job code, compensation, company, business_unit, reg/temp, full/part-time, standard hours or classified indicator has been changed. Incumbent job data will not be automatically updated. If the change is to be applied to incumbent job data, continue Position Data save process then proceed to Workforce Administration > Manage Human Resources > Manage Job and enter the change there. Press OK to continue save process.

OK Cancel

13. Select **OK**.

A second warning displays advising that the position is *inactive* and assumed to have no incumbents.

Warning -- Position is inactive. No incumbent updates will be made. Inactive positions are assumed to have no current incumbents. If you expect incumbent updating to take place, the position must first be re-activated by changing effective status to 'Active'.

OK Cancel

The position cannot be assigned to an employee again unless another action is entered to make the position active again.

14. Select **OK** to continue.

If the UPDATE INCUMBENTS indicator was not toggled to **No** when the position status was updated to *Inactive*, a warning displays advising that the UPDATE INCUMBENTS indicator should be turned **off**.

Warning -- Update incumbents flag should be turned off for a position with no incumbents. Since this position doesn't have employees assigned to it, the Update Incumbents flag should be turned off. Uncheck the Update Incumbents checkbox on the Specific Information page.

OK Cancel

15. Select **Cancel** to turn off the UPDATE INCUMBENTS indicator.

16. Select the **Budget Incumbents** page.

17. Toggle the UPDATE INCUMBENTS indicator to **No**.

18. Select **Next** to return to the **Review and Submit** page.

The screenshot shows the 'Manage Position' page with a sidebar on the left containing five steps: 1. Position Data, 2. Additional Information, 3. Budget Incumbents, 4. Position and Reporting details, and 5. Review and Submit. The main content area is titled 'Step 5 of 5: Review and Submit' and displays the following information:

- Effective Date: 12/01/2024
- Reason Code: UPD - Update Position
- Approval Status: Not Available
- Effective Sequence: 0

Below this is a 'Summary Of Changes' table:

Description	Proposed Value	Current Value
Status as of Effective Date	I	A
Action Date	02/13/2025	09/30/2024

19. Select **Submit** to save.

A confirmation page displays advising that the position was successfully updated.

The screenshot shows the 'Position Confirmation' page with a green success message: 'The Position Number 00006185 has been successfully updated.' Below the message, it displays the position details:

- Position Number: 00006185
- Headcount Status: Open
- Current Head Count: 0 of 1

At the bottom, there are two buttons: 'Go to Position Details' and 'Go to Manager/Create Position'.

20. Select **Go to Position Details** to view the updated position row.

The position status shows as Inactive.

The screenshot shows the 'View Position' page for Position Number 00006185. It displays the following information:

- Effective Date: 11/01/2024
- Effective Sequence: 0
- Reason: UPD - Update Position
- Approval Status: Approved
- Position Status: Approved
- Status: Inactive
- Action Date: 02/13/2025
- Key Position: No
- Budgeted Position: Yes
- Confidential Position: No
- Max Head Count: 1
- Status Date: 02/19/2020
- Job Sharing Permitted: No
- Available for Telework: No

Reactivating a Position

Navigation

Dashboard: Workforce Administration; **Tile:** Manage Human Resources, Manage Position
NavBar: Menu, Organizational Development, Position Management, Manage Position

1. Enter the **POSITION NUMBER** of the position to be reactivated.

The screenshot shows the 'Manage/Create Position' search page. It features a search criteria section with several input fields and dropdown menus. A red arrow points to the 'Position Number' field, which contains the value '00006185'. Another red arrow points to the 'Include History' checkbox, which is checked. The search criteria include:

- Position Number: begins with [00006185]
- Position Status: begins with []
- Business Unit: begins with []
- Job Code: begins with []
- Description: begins with []
- Reports To Position Number: begins with []
- Department: begins with []
- Company: begins with []

At the bottom, there are 'Search' and 'Clear' buttons.

2. Select the **Include History** checkbox.

3. Select **Search**.

4. Select **Add Row**.

Position Details

Position Number: 0000185
Headcount Status: Open
Current Head Count: 0 of 1

Effective Date %	Effective Sequence %	Reason %	Business Unit %	Department %	Job Code %	Location %	Reports To %	
12/01/2024	0	UPD-Update Position	Agency 084 BU	Executive Administration	Admin Assnt II	111 CAPPS Way		[P] [B] [X]
09/01/2024	0	UPD-Update Position	Agency 084 BU	Executive Administration	Admin Assnt II	111 CAPPS Way		[P] [B] [X]
09/01/2023	0	UPD-Update Position	Agency 084 BU	Executive Administration	Admin Assnt II	111 CAPPS Way		[P] [B] [X]
09/01/2022	0	UPD-Update Position	Agency 084 BU	Executive Administration	Admin Assnt II	111 CAPPS Way		[P] [B] [X]

5. Enter the **EFFECTIVE DATE**.

Request Details

*Effective Date: 01/01/2025

Effective Sequence: 0

*Reason Code: UPD UPD-Update Position

6. Enter **UPD** in the **REASON CODE** field.

7. Select **Continue**.

The **Position Data** page displays.

8. Select **Active** the **STATUS** field dropdown menu (in the **Position Information** section).

Manage Position

Position Number: 0000185
Headcount Status: Open
Current Head Count: 0 of 1

Step 1 of 5: Position Data

Effective Date: 01/01/2025

Reason Code: UPD-Update Position

Approval Status: Not Available

Position Information

*Last Status: **Approved**

*Status: **Active**

Action Date: 02/13/2025

Key Position: No

Budgeted Position: Yes

Confidential Position: No

Job Information

*Business Unit: 08400 Agency 084 BU

*Job Code: 0182 Admin Assnt II

*Regular/Temporary: Regular

*Regular Status: Not Applicable

*Title: Admin Assnt II

Work Location

*Org Region: USA United States

*Department: 1300 Executive Administration

*Full/Part Time: Full Time

Union Code: Admin Assnt

Short Title: Admin Assnt II

Description: Admin Assnt II

Company: 084 Agency 084

Dist Line:

Security Clearance:

9. Select **Next** to move through the position pages until the **Budget Incumbents** page displays.

10. Toggle the **UPDATE INCUMBENTS** indicator to **Yes**.

Manage Position

Position Number: 0000185
Headcount Status: Open
Current Head Count: 0 of 1

Step 3 of 5: Budget Incumbents

Effective Date: 01/01/2025

Reason Code: UPD-Update Position

Approval Status: Not Available

Current Budget

Earnings: 0.000

Deductions: 0.000

Tax: 0.000

Costs: 0.000

Total: 0.000

Incumbents

Update Incumbents: Yes

Include Salary Plan/Grade: No

Force Update for Title Changes: No

11. Select **Next** to move through the position pages until the **Review and Submit** page displays.

Manage Position

Position Number: 0000185
Headcount Status: Open
Current Head Count: 0 of 1

Step 5 of 5: Review and Submit

Effective Date: 01/01/2025

Reason Code: UPD-Update Position

Approval Status: Not Available

Summary of Changes

Description	Proposed Value	Current Value
Status as of Effective Date	A	I
Update Incumbents	Y	N

12. Review the **Current Value** and the **Proposed Value** columns for accuracy.

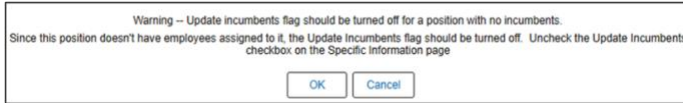
13. Select **Submit**.

A warning message displays regarding changes to incumbent data and changes to position data.



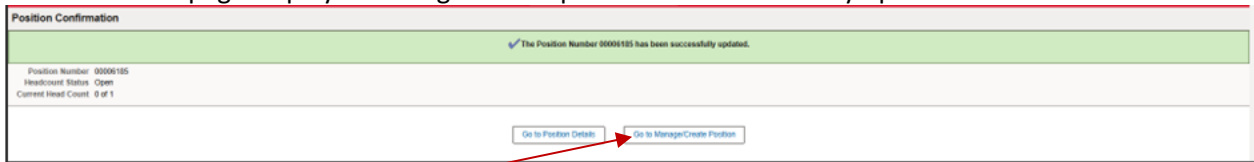
14. Select **OK** to continue.

A warning displays regarding the Update Incumbents flag.



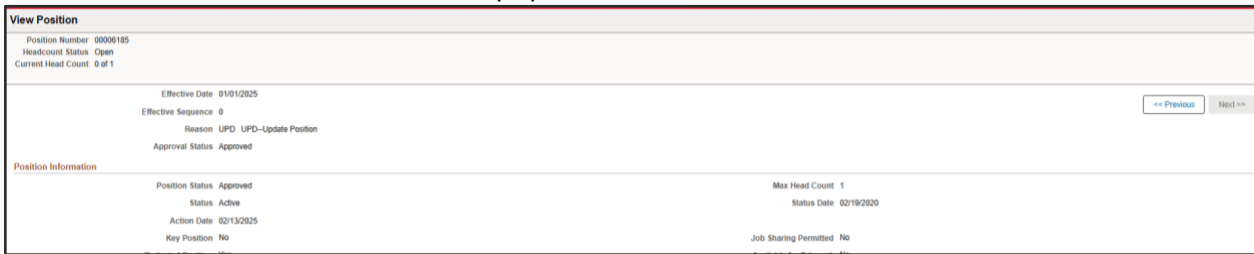
15. Select **OK** if this position will be filled.

A confirmation page displays advising that the position was successfully updated.



16. Select **Go to Position Details** to view the updated position row.

The POSITION STATUS was successfully updated.



Deleting a Position Row

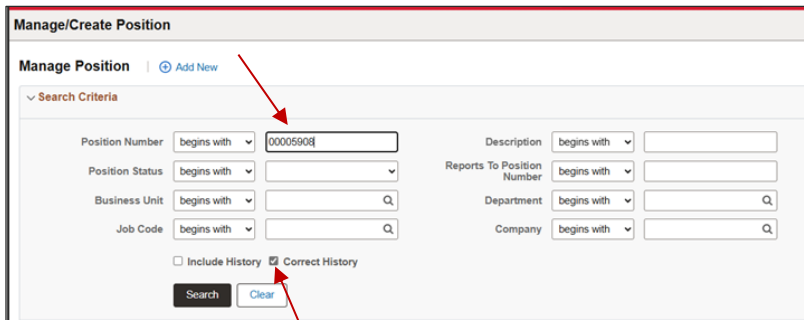
Deleting a position row may impact employee job records. Verify if the job records need corrections before deleting a position row on Manage Position.

Navigation

Dashboard: Workforce Administration; **Tile:** Manage Human Resources, Manage Position

NavBar: Menu, Organizational Development, Position Management, Manage Position

1. Enter the POSITION NUMBER.



2. Select the **Correct History** checkbox.

3. Select **Search**.

- Select the **Delete** (trash can) icon on the position row to be deleted.

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Reports To
09/01/2024	0	UPD-Update Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]
09/01/2023	0	UPD-Update Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]
09/01/2022	0	UPD-Update Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]
09/01/2021	0	UPD-Update Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]
09/01/2020	0	UPD-Update Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]
09/01/2019	0	NEW-New Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]

A warning message displays regarding corresponding current or future job records for current incumbents.



- Select **OK**.
The **Position Details** page displays without the deleted row.

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Reports To
09/01/2023	0	UPD-Update Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]
09/01/2022	0	UPD-Update Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]
09/01/2021	0	UPD-Update Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]
09/01/2020	0	UPD-Update Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]
09/01/2019	0	NEW-New Position	Agency 084 BU	Information Services	Director VI	111 CAPPS Way	[Delete Icon]

Position Updates and Employee Job Data

For filled positions, CAPPS automatically writes an update row to employee Job Data when updates are made on position data for:

- REPORTS-TO
- DEPARTMENT
- LOCATION

These changes are automatically written to Manage Job and do not require manual entry of another row on employee Job Data. Users should navigate to employee Job Data in CAPPS **Manage Job** to verify the rows were written to Job Data.

These rows will not automatically write to employee Job Data if the effective date of change entered on Position Data is an earlier-dated row than the data rows on employee Job Data.

For example, if a Sept. 1, 2024 position data row is updated to change an employee's department and location assignment, but there is an existing Oct. 1, 2024 data row already on employee Job Data, CAPPS cannot create an earlier-dated row on Job Data and overwrite any later-dated rows on employee Job Data.

The agency super user must manually refresh the employee's job data rows equal to the date of the position data change, and any later-dated rows on Job Data to populate those changes on employee Job Data.

For filled positions, CAPPS will not automatically write an update row to employee Job Data when certain updates are made on position data, such as:

- Job code changes
- Changes to *Standard Hours*
- Salary plan and step changes

A corresponding transaction on **Manage Job** must be entered manually to complete the action on employee Job Data.

For example, if an employee receives a promotion effective Dec. 1, 2024, an update row must be entered on position data to update the employee job code and salary group assignment. Then, a promotion transaction to update the job code, salary plan and employee compensation rate would be entered effective Dec. 1, 2024 on Manage Job to complete the promotion action.

Revision History

Date	Description of Change	Changed By
Dec. 11, 2025	Initial release.	M. Hoffman