

Position and Jobs

SDBOR

Part II - Training



Training Objectives

- Understand Basics of Rule Forms Impacting Positions and Jobs
- Understand Application Forms for Positions
- Understand Application Forms for Jobs
- In Booklets, Key Board and Navigation

Position

- Manual
- Rules and Validation Notes
- Pyramid
- Relationship Example
- HR Fiscal YR End Processes
- Creating Working Budget Checklist

Position Rule Forms



Position Rule Forms

- PTREMPR –Employer Defined
- NTRSGRP – Salary Group
- NTRSALA – Salary Schedule
- PTRECLS – Employee Class
- PTRPGRP – Position Group
- PTVESKL – Demographic Reporting
- NTRPCLS – Position Glass
- NTVBPRO – Budget Profile
- NTRFRNG – Fringe Benefits

PTREMPR

- Defines Employer
 - EIN
 - Address
 - IPEDS

NTRSGRP

- Salary Group
 - Establishes Annual Salary
 - Defined by FY
 - USD and SDSU Exempt
 - Faculty – General
 - NFE – General
 - CSA

NTRSALA

- Salary Schedules Defined
- CSA Ranges – T, N, M
- Exempt General Salary Range
- SDSU
- USD

PTRECLS

- Driver of the System
- Job Defaults
- Employee Defaults
- Payroll Defaults
- Timekeeping Defaults
- IPEDS
- Budget
- Eligible Earnings
- Leave Category
- Benefit Category

PTRPGRP

- Position Group
- Will be used for Reporting Operating Budget
- Defines the following
 - Non-Instructional Administrator
 - Instructional Administrator
 - CSA
 - Professional/Technical
 - Faculty
 - Graduate Assistants
 - PT & FT

PTVESKL

- Skill Level of Position
- Workforce Demographics
 - Affirmative Action Plans and Monitoring
- EEO Reporting

NTRPCLS

- Position Classification
- CSA - Specifications
- NFE
- Faculty
- Built from PTVESKL, NTRSGRP, NTRSALA, PTRPGRP

NTVBPRO

- Budget Profile
- EMPR on NBAPBUD

NTRFRNG

- Fringe Benefit Rule Form

Pyramid

- Step 1 - Payroll ID – PTRPICT
- Step 2 - Employee Class – PTRECLS
- Step 3 - Position Class – NTRPCLS
- Step 4 - Positions – NBAPOSN and NBAPBUD
- Step 5 - Jobs – NBAJOBS
- Step 6 - Labor Distribution – NBAJOBS

Position Application Forms



Position Application Forms

- NBAPOSN
 - Technical Tables
 - NBBPOSN
 - Application
 - Creation of Positions
 - Built from NTRPCLS Default Values
 - Built from PTRPGRP, PTVESKL, NTRSALA, and NTRSGRP

Position Application Forms – Continued

- NBAPBUD
 - Technical Tables
 - NBBPOSN – Position (NBAPOSN)
 - NBRPTOT – Position Totals
 - NBRPLBD – Labor Distribution
 - NBRRTOT – Premium Earnings Totals
 - NBRFTOT – Fringe Totals
 - Application
 - Defining a Position Budget

Budget SDBOR Processes

- Account on FOAP must coincide with PTRPGRP
- Example of Relationship
 - [HR, Budget and Finance](#)
- Permanent Changes
- Appointment Percent 100%
- Job FTE (Budgeted – Reporting)
 - Join NBAPOSN to NBAPBUD to PTRPGRP

Exercise

- Go to TEST
 - Create New Position
 - Establish Budget
-
- 15 Minutes

Position Inquiry Screens

- NBIPINC – Position Incumbent
- NBICLSH – Position Classification History
- NBIPLST – Position List by Classification
- NBIPOSH – Position History
- FBIBUDG – Compare Budget Phase Data
- NBIPORG – Position by Organization
- NBIBTOT – Budget Totals
- NBIBHFS – Budget Actual Fringe Benefits
- NBIBHSR – Budget Premium Earnings
- NBIBHSP – Budget Position History

Jobs

- Manual
- Rules and Validation Notes
- Highlights Manual
- Calculator

JOBs Rule Forms

Job Rule Forms

- PTRECLS – Employee Class
- NTRPCLS – Position Class
- PTRJCRE – Job Change Reason
- NTRSGRP – Salary Group
- NTRSALA – Salary Range
- PTRBDCA – Benefit and Deduction
- PTREARN - Earnings
- FTVORGN – Organization
- FTVFUND - Fund
- FTVACCT - Account
- FTVPROG - Program

PTRECLS

- Driver of the System
- Job Defaults
- Employee Defaults
- Payroll Defaults
- Timekeeping Defaults
- IPEDS
- Budget
- Eligible Earnings
- Leave Category
- Benefit Category

NTRPCLS

- Position Classification
- CSA - Specifications
- NFE
- Faculty
- Built from PTVESKL, NTRSGRP, NTRSALA, PTRPGRP

NTRSGRP

- Salary Group
 - Establishes Annual Salary
 - Defined by FY
 - USD and SDSU Exempt
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NTRSALA

- Salary Schedules Defined
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- SDSU
- USD

PTRBDCA

- Benefit Deduction Categories
 - Rules
 - Options
 - Web Information
 - Plans
 - Precluded
 - Excluded
 - Labor Distributions

PTREARN

- Eligible Earnings
- Base Pay
- Cash – Non Cash
- Accrual of Leave
- Usage of Leave
- FOAP Override

FTVFUND, FTVORGN, FTVACCT, and FTVPROG

- Fund, Orgn, Acct, and Prog
 - FOAP Elements (NBAJOBS and NBAPBUD)
- ORGN
 - Home Organization
 - Payroll Organization
 - Timekeeping Organization
 - Organization Security

Job Application Forms



Job Application Form

- NBAJOBS
 - Technical Tables
 - NBRBJOB – General Job Tab
 - NBRJOBS – Job Detail and Payroll Default Tab
 - NBRJOBS – Deferred Pay and Miscellaneous Tab
 - NBRXDED – Excluded Deduction Tab
 - NBREARN – Default Earnings Tab
 - NBBWKSH – Work Schedule Tab
 - NBRJLBD – Labor Distribution Tab

Job Application Form

– Application

- Establishing a Job
- Setting Up Payroll
- Setting Up WTE
- Establishing Deferred Pay
- Setting Up Supervisor – Checking to match NBAPOSN
- Establishing Default Earnings
- Excluding Deductions
- Establishing Work Schedule
- Establishing Labor Distribution
- Change Reasons****

JOB SDBOR Processes

- Temporary/Permanent Changes of Funding
- Temporary/Permanent Changes of Salary
- Temporary/Permanent Job Changes
 - Termed from Job
 - Temporary Change in Duties
- Sabbaticals
- Leave with Benefits
- Effective Dates with Changes
- WTE

Exercise

- You can select one or more to complete
 - Temporary Change in FOAP with Effective Dates – Need to future date back to original
 - Temporary Change in Salary with Effective Dates – Need to future date back to original
 - Deferred Earnings for less than 12 FY08
 - Change Jobs

Jobs Inquiry Screens

- **Employee Salary History (PEISALH)**
 - Employee salary information by totals.
- **Job Changes Detail Display (PEAJCDD)**
 - Employee salary information by position.
- **Attendance History (PEIATND)**
 - Employee attendance history.
- **Job Labor Distribution History (NBIJLHS)**
 - Employee Job Labor distribution history by position.
- **Job History (NBIJLST)**
 - Incumbent history by job.
- **Employee Job History (PEIJHIS)**
 - Employee job history.
- **Employee Leave History (PEILHIS)**
 - Incumbent leave history.
- **Employee History (PEIEHIS)**
 - Incumbent history.
- **Employee Probationary History (PEIEPRO)**
 - Incumbent probationary history.

State Interface Update

If Time Allows

State Interfaces

- PZRBFMF – Employment and Benefit Records (W, M, C)
- NZRBPED – Payroll Expenditure (M, C)
- NZPSRPT – Expenditure Feed to Finance (M, C)
- PZRSDRS – Monthly SDRS
- PZRUNEM – Quarterly Unemployment
- PZRHIRE – New Hire (Weekly)
- PZRHLTH – In Bound BOP (Weekly)
- PZRTXBL – In Bound BOP (Monthly)

PZRBFMF

- Weekly, Monthly and Correction
- NBAJOBS
 - Compensation
 - Title
- PEAEMPL
 - Status
 - Dates
 - Job Location

NZRBPED

- Monthly and Correction
- Payroll Expenditure
 - PHREARN
 - PHRDEDN
- FTE Tracking
 - Calculation based on Hours per FY

NZPSRPT

- Monthly and Correction
- Revenue Expense
- Valid FOAPS
 - NBRJLBD (NBAJOBS)
 - PTRBDCA

PZRSDRS

- SDRS Detail
 - PEAEMPL
 - ETOT
 - DTOT
 - PHRDEDN
 - PHRHIST

PZRUNEM

- Unemployment File – DOL
 - ETOT
 - PEAEMPL

PZRHIRE

- DOL New Hire
 - PEAEMPL
 - By JBLN

PZRHLTH

- Health Changes – In Bound (BOP)
 - Still Testing
 - Meeting with BOP to review file
 - Will update PDAEDN

Phase II – PDABENE, PDABCOV

PZRTXBL

- Taxable Benefits
 - BOP
 - FIS
 - Load into PHPMTIM
 - Populate PHRMTIM, Can View PHAMTIM
 - Load into PHAHOUR