



National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture

March 2016

Position Management System Online (PMSO)



PUBLICATION CATEGORY
Human Resources and Payroll Processing

PROCEDURE MANUAL
Position Management System Online



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Latest Update Information

Section	Description of Change
PMSO Procedure Manual	Procedure document has been updated throughout to be accessible with assistive technology according to Section 508 of the Rehabilitation Act.



System Overview

The Position Management System Online (PMSO) procedure provides instructions for accessing and using PMSO. PMSO is a National Finance Center (NFC) real time online database system of the United States Department of Agriculture's (USDA) Payroll/Personnel System (PPS).

PMSO allows Agencies to add, change, inactivate, reactivate, and delete/restore position data for immediate update to the PMSO database. PMSO also provides Agencies report generation and online inquiry capabilities for PMSO data and allows for complete control and management of position data.

To access PMSO, you must (1) have authorized security clearance and (2) use a computer that is connected to the mainframe computer located at NFC.

This section includes the following topics:

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System Design

PMSO is designed with menu(s) and key-field selections. The menu lists Master Record and Individual Position command options for selecting a specific function code. The function codes are used to add, query, change, delete/restore, inactivate, and reactivate a Master Record and/or Individual Position and request reports.

Each function has a Master Record and/or Individual Position screen. The screens are basically the same; therefore, instructions and screen illustrations are provided for **AM** (Add Master Record) and **AI** (Add Individual Position). For information on the other function codes pertaining to the Master Record or Individual Position follow the **Add Individual Position (AI)** (on page 22) section with specifics for each.

Below is a brief description of each function code:



The **Query** and **Inquiry** functions allow the user to query the PMSO database. These functions should be selected first to inform the user of the Master Records and Individual Positions that have been inactivated and deleted but are still on the PMSO database.

The **Add** function allows the user to add or establish a Master Record and/or Individual Position.

The **Change** function allows the user to make necessary changes to the Master Record and/or Individual Position.

The **Delete/Restore** function allows the user to delete a Master Record and/or Individual Position that is no longer needed, or to restore a Master Record and/or Individual Position that is needed after the **Delete** function was previously performed.

The **Inactivate** function allows the user to save a Master Record and/or Individual Position but in an inactive state.

The **Reactivate** function allows the user to reactivate an inactivated Master Record and/or Individual Position.

The **Help** function allows the user to view the Help screen for a Master Record or Individual Position.

The **Report Selection** function allows the user to generate desired reports.

The key fields at the top of each PMSO screen are used to identify a unique Master Record or Individual Position on the PMSO database. Each Master Record screen contains the first five of the key fields listed below; each Individual Position screen consists of all six of the key fields.

- Department Code
- Agency/Bureau Code
- Personnel Office Identifier (POI)
- Master Record Number
- Grade
- Individual Position Number

System Interface

PMSO interfaces with the following systems/applications:



EmpowHR

EmpowHR is a Human Capital Management System comprised of an integrated suite of commercial and Government applications that support all critical Human Resources (HR) components in a single enterprise system.

Front-End Systems Interface (FESI)

FESI is an alternate method that can be used to enter position data and personnel data. FESI enables Agencies to transmit data daily through batch submissions. Agencies using FESI receive confirmation reports showing the types of documents transmitted, a count of records transmitted to NFC, and any errors encountered during transmission.

If position data does not pass edits, an edit message is displayed on the Suspense report. Document Type 998, Front-End Systems Interface (FESI) Position Data, identifies position data that was released through FESI but failed the edits. Users must (1) correct the position data in their front-end system and transmit a new record to NFC, or (2) use PMSO to update or establish the position data.

Suspense reports should be requested from the Payroll/Personnel Report Generator System (CULPRPT) by using Option 4, **Error Suspense Reports**. Position data entered through FESI is identified on the CULPRPT reports by special batch number 67 (i.e., CULPRPT Report U6701, SINQ 67 Listing of Personnel Edit Messages). If a batch number begins with 67, the document is held in suspense for one pass and is coded for deletion (Override Code 4).

Personnel Input and Edit System (PINE)

PINE performs edits on the position data entered through PMSO and the personnel actions entered before they are applied to the Payroll/Personnel database. PINE processes personnel and payroll documents Monday through Friday of each week and on the first Saturday of the pay period, regardless of the effective pay period.

Of the actions that pass PINE edits, those with a current or prior effective pay period are sent to the Personnel Processing System (PEPL) to update the Payroll/Personnel database. Position data and personnel actions that fail PINE edits are placed in suspense. During the processing of PINE, position data and employee data are linked.

When a change is made in PMSO to one of the data elements below, the message *Master Record (or Individual Position) Successfully Modified - Personnel Action Required* is displayed on the PMSO screen. This message alerts users that a personnel action must be submitted for the change.

- Master Record
 - Pay Plan
 - Occupational Series Code
 - Occupational Function Code



- Position Supervisory Code
- PATCO
- Individual Position
 - FLSA Code
 - Organizational Structure Code
 - Duty Station Code
 - Pay Table Code
 - Bargaining Unit Status Code
 - Duty Station Code
 - LEO Indicator
 - Interdisciplinary Occupational Series Code

If an official personnel action is not processed, a message appears on CULPRPT Reports U0001, Listing of Personnel Error Messages, and U0006, Listing of Personnel Error Messages. This message will remain on the suspense report indefinitely until the official personnel action is processed.

Table Management System (TMGT)

TMGT is an online system that contains valid values and descriptions for position data entered through PMSO. Certain fields in PMSO are validated against TMGT (e.g., Department Code, Agency/Bureau Code, POI, etc.). When errors occur, users can verify the data again against TMGT. For detailed information, see the TMGT procedure.

Web-based Entry, Processing, Inquiry, and Correction System (EPIC Web)

EPIC Web is a Web-based application that is used to enter payroll and personnel transactions for processing in PPS, correct transactions that have failed PINE edits, execute suspense and status reports, delete and restore transactions, view and/or edit future and current Payroll/Personnel transactions to be processed, cancel and change history records, and rollback applied documents.

Help Screens

Help screens are available for completing the key fields and other fields displayed on the screen. Help screens display a list of valid codes and/or a narrative description for each field. To obtain a Help screen at any function screen, position the cursor on the field in question and press **PF5**. The applicable Help screen is displayed and provides a description of the field either in narrative format or by listing the valid entry codes. Press **Enter** to return to the previous screen. Help screens are also available through the **Help Master Record (HM)** or **Help Individual Position (HI)**



option at the Position Management System Online screen. For detailed instructions about accessing these screens, see *Help Master Record (HM)* or *Help Individual Position (HI)* (on page 49).

BLOCK	FIELD NAME (ABBREVIATION)	SIZE	ACTION
02	DEPARTMENT CODE/AGENCY BUREAU CODE (DEPT-CD/AGCY-BUR-CD)	04	ALL
IDENTIFIES A PARTICULAR AGENCY, BUREAU OR OPERATING UNIT.			
VALUES ARE AUTHORIZED ASSIGNED AGENCY CODES.			
THIS FIELD IS REQUIRED ON ALL ACTIONS BUT CANNOT BE CHANGED THROUGH THE CHANGE FUNCTION.			

Figure 1: Help Screen for Key Record Fields Screen

Position Data

Position data includes a Master Record and one or more Individual Positions linked to it. The Master Record contains basic position data (e.g., grade, pay plan, occupational series code, etc.). Each Individual Position, which is linked to a specific Master Record, contains data, such as the organizational structure code, duty station code, accounting station code, etc., that identifies an Individual Position.

Each Master Record and Individual Position is assigned a number by the appropriate personnel office. The personnel offices must maintain a record of these assigned numbers in order to avoid duplicates. The Position Organization Listing (POL), which is a report that can be printed in six different formats by selecting **SR** on the Position Management Online screen, provides the status of all positions in PMSO. For detailed information on the POL, see the *Report Selection (SR)* (on page 52) section in this procedure.

After a position is classified, a Master Record must be added in PMSO if it does not already exist. The Master Record must be established in PMSO before an Individual Position(s) is added.

In PMSO, position data (e.g., grade, Master Record number, etc.) is established, updated, and edited separately from personnel data (e.g., Nature of Action Code (NOAC) and authority, base salary, Federal Employees Health Benefits (FEHB) coverage, etc.), which is entered through the Web-based Entry, Processing, Inquiry, and Correction System (EPIC Web), EmpowHR, or your Agency Front-End Systems Interface (FESI).

A Master Record and Individual Position must be established in PMSO before the appropriate personnel action (accession, promotion, reassignment, etc.) can be entered. The following PMSO



key data elements, which must be entered for the personnel action, must be the same as the position data entered in PMSO:

- Department Code
- Agency/Bureau Code
- Personnel Office Identifier (POI)
- Master Record Number
- Grade
- Individual Position Number

The PMSO position data and the PMSO key data elements entered on a personnel action and then linked during the processing of the Personnel Input and Edit System (PINE).

When certain data elements (e.g., pay plan, occupational series code, etc.) are changed in PMSO, a personnel action must also be entered and successfully processed through PINE in order to update the employee's Payroll/Personnel database record.

Classification Action/Position Classification Code

The Classification Action/Position Classification Code must be completed on the personnel document when certain personnel actions, such as a reassignment, promotion, or change to a lower grade, are processed. The purpose of the code is to provide a method for processing a PMSO classification and personnel action at the same time. The code indicates the action that the Agency wants to take with respect to the position that an employee is vacating. Valid codes are:

Position Classification Code	Description
0	Leave former position vacant and active.
1	Abolish former position.
2	Inactivate former position.

After one of the codes listed above is entered on the processing personnel action and successfully processed through PINE, the employee is removed from the former position. The status of the vacated position in PMSO is determined by the classification action code.

Whenever the employee is being reassigned to an Agency within the same Department, the losing Agency should inform the gaining Agency of the disposition of the former position.



2. Press **Enter** to display the NFC banner screen.



Figure 3: NFC Banner Screen

3. Complete the fields as described below.

Field	Description/Instruction
Enter User ID	Type your assigned user identification (ID) (i.e., NF0999). Press Tab .
Password	Type your password. (Your password is not displayed on the screen.) Press Tab . Note: You may press Enter (instead of Tab) after typing your password to go directly to the CL/SUPERSESSION Main Menu screen.
New Password?	Displays system-generated "N." If you are not changing your password, press Tab. If you are changing your password, enter "Y." Then complete the steps for changing your password as described under Changing Your Password (on page 10).
Enter Application Name	Type the application acronym and press Enter to go directly to that system. OR Leave the field blank and press Enter to go directly to the CL/SUPERSESSION.

4. At the CL/SUPERSESSION Main Menu screen:

- Press **F8** to scroll through the Session IDs until the appropriate Session ID appears.
- **Tab** until the cursor is located on the line next to the Session ID.
- Press **Enter**.



OR

- Press **F9** to bring the cursor to the Command Line at the bottom of the screen and retrieve a specific Session ID.
- Type **s**.
- Press the **space bar** once.
- Type the Session ID acronym.
- Press **Enter**. See screen below for an example. The applicable system is displayed.

```

----- Actions Options Commands Features Help -----
KLSVSEL1                CL/SUPERSESSION Main Menu                More: +
Select sessions with the ENTER key or use a "/"
to display an action code.
  Session ID  Description                                Type      Status
-----
- IDMS05     IDMS05                                Multi
- PINQ05     IDMS05                                Multi
- ABCDINQ    IDMS03                                Multi
- ABCD       IDMS03                                Multi
- $DB2       TSDB $DB2      TSDB  PRDC($DB2  Multi
- $ORACLE    TSDA                                Multi
- $ORACLEA   TSDA                                Multi
- $SPFA      TSDA $SPFA    TSDA  PRDC($SPF  Multi
- $SPFAV2    TSDA $SPFAV2  TSDA  PRDC($SPF  Multi
- $SPFB      TSDB $SPFB    TSDB  PRDC($SPF  Multi
- $SPFBV2    TSDB $SPFBV2  TSDB  PRDC($SPF  Multi
- $SPFC      TSOC $SPFC    TSOC  PRDC($SPF  Multi

ISS7030I Password Changed
Command ==>
Enter F1=Help F3=Exit F5=Refresh F8=Fwd F9=Retrieve F10=Action
SYSB/T30N6447
    
```

Figure 4: CL/SUPERSESSION Main Menu Screen

```

----- Actions Options Commands Features Help -----
KLSVSEL1                CL/SUPERSESSION Main Menu                More: +
Select sessions with the ENTER key or use a "/"
to display an action code.
  Session ID  Description                                Type      Status
-----
- IDMS05     IDMS05                                Multi
- PINQ05     IDMS05                                Multi
- ABCDINQ    IDMS03                                Multi
- ABCD       IDMS03                                Multi
- $DB2       TSDB $DB2      TSDB  PRDC($DB2  Multi
- $ORACLE    TSDA                                Multi
- $ORACLEA   TSDA                                Multi
- $SPFA      TSDA $SPFA    TSDA  PRDC($SPF  Multi
- $SPFAV2    TSDA $SPFAV2  TSDA  PRDC($SPF  Multi
- $SPFB      TSDB $SPFB    TSDB  PRDC($SPF  Multi
- $SPFBV2    TSDB $SPFBV2  TSDB  PRDC($SPF  Multi
- $SPFC      TSOC $SPFC    TSOC  PRDC($SPF  Multi

Command ==> s TMGT
Enter F1=Help F3=Exit F5=Refresh F8=Fwd F9=Retrieve F10=Action
SYSB/T30N6447
    
```

Figure 5: CL/SUPERSESSION Main Menu Screen (Session ID Displayed)



Signoff Instructions

Follow the signoff-screen prompts at the bottom of the screen to exit the system or to return to the CL/SUPERSESSION Main Menu screen.

```
----- Actions Options Commands Features Help -----
KLSVSEL1          CL/SUPERSESSION Main Menu          More: +
Select sessions with the ENTER key or use a "/"
to display an action code.
  Session ID  Description                                Type      Status
-----
  IDMS05     IDMS05                                Multi     Current
  PINQ05     IDMS05                                Multi     Active
  KLSTERM1   Exit Menu
  Type a selection number or position the
  cursor on a line and press ENTER.
  1. Exit and terminate sessions (X)
  2. Exit and do not terminate sessions (N)
  3. Resume (R)
  Command ==>
  Enter  F1=Help  F12=Cancel
                                                    SYSB/T30N6447
  retrieve  F10=Action
```

Figure 6: CL/SUPERSESSION Main Menu Screen

1. At the CL/SUPERSESSION Main Menu screen, press **F3** and the Exit Menu popup is displayed.
2. Position the cursor in front of Exit and press **Enter** to exit and terminate the CL/SUPERSESSION.

OR

Position the cursor in front of Resume and press **Enter** to exit the application without terminating the CL/SUPERSESSION Main Menu screen.

Changing Your Password

If you need to change your password:



1. Type "Y" next to the New Password? prompt on the NFC banner screen.

```
=====
== CURRENT DATE          SNX32703          T30N6447          PF1=HELP          ==
=====
==          NN      NN          FFFFFFFF          CCCCCCCC          ==
==         NNN     NN          FFFFFFFF          CCCCCCCC          ==
==        NNNN    NN          FF              CCC              ==
==       NN NN NN          FFFFFFFF          CCC              ==
==      NN  NNNN          FFFFFFFF          CCC              ==
==     NN   NN          FF              CCCCCCCC          ==
==    NN    NN          FF              CCCCCCCC          ==
=====
==          National Finance Center          ==
==  ===== Office of the Chief Financial Officer =====  ==
==  ===== United States Department of Agriculture =====  ==
=====
==          For Authorized Use Only          ==
== ENTER USER ID =          PASSWORD =          NEW PASSWORD? Y          ==
==                                     (Y or N)          ==
== ENTER APPLICATION NAME =          OR PRESS ENTER FOR MENU          ==
=====
```

Figure 7: NFC Banner Screen (with New Password? prompt set to Y)

2. Press Enter and the Change Password screen appears.

```
-----
KLGNPWD1          Change Password
-----
Type in your new password twice, and press ENTER.

Enter new password.....
Verify new password.....

Command ==>
Enter F1=Help F3=Exit F12=Cancel
-----
```

Figure 8: Change Password Screen

3. Enter the new password.
4. Verify the new password. Once you have entered your new password and verified it, the system will display another screen stating that the password was changed. See screen below.

Note: You may change your password at anytime, but no more than once a day. Before your password expires, you will be prompted to enter a new password.

```
-----
ISS7030I Password Changed
-----

Press ENTER to continue
-----
```

Figure 9: Password Changed Verification Screen



Position Management System Online Screen

After you access PMSO, the Position Management System Online screen is displayed. For users with read-only access, an abbreviated Position Management System Online screen is displayed. The menu provides users with function codes for query, add, change, delete, inactivate, reactivate, Help screens, and report generation.

```
PPPPPPPP                                     *** POSITION MANAGEMENT SYSTEM ONLINE ***
PP      PP
PPPPPPPP                                     QM ---> QUERY MASTER RECORD
PP                                           QI ---> QUERY INDIVIDUAL POSITION
PP                                           AM ---> ADD MASTER RECORD
PP                                           AI ---> ADD INDIVIDUAL POSITION
MM      MM
MM M M MM
MM M MM
MM      MM
MM      MM
SSSSSSSS
SS
SSSSSSSS
SS
SSSSSSSS
00000000
00      00
00      00
00      00
00000000
                                           CM ---> CHANGE MASTER RECORD
                                           CI ---> CHANGE INDIVIDUAL POSITION
                                           DM ---> DELETE/RESTORE MASTER RECORD
                                           DI ---> DELETE/RESTORE INDIVIDUAL POSITION
                                           IM ---> INACTIVATE MASTER RECORD
                                           II ---> INACTIVATE INDIVIDUAL POSITION
                                           RM ---> REACTIVATE MASTER RECORD
                                           RI ---> REACTIVATE INDIVIDUAL POSITION
                                           HM ---> HELP MASTER RECORD
                                           HI ---> HELP INDIVIDUAL POSITION
                                           PI ---> POSITION INQUIRY
                                           SR ---> REPORT SELECTION MENU
                                           EX ---> EXIT POSITION MANAGEMENT SYSTEM
                                           SELECT OPTION
```

Figure 10: Position Management System Online Screen



```
PPPPPPPP          *** POSITION MANAGEMENT SYSTEM ONLINE ***
PP      PP
PPPPPPPP          QM ---> QUERY MASTER RECORD
PP              QI ---> QUERY INDIVIDUAL POSITION
PP              HM ---> HELP MASTER RECORD
PP              HI ---> HELP INDIVIDUAL POSITION
              PI ---> POSITION INQUIRY
              SR ---> REPORT SELECTION MENU
              EX ---> EXIT POSITION MANAGEMENT SYSTEM

      MMM      MMM
      MM M M MM
      MM M MM
      MM      MM
      MM      MM

      SSSSSSSSS
      SS
      SSSSSSSSS
      SS
      SSSSSSSSS

      00000000
      00      00
      00      00
      00      00
      00000000

                        SELECT OPTION SR
```

Figure 11: Position Management System Online Screen (for users with read-only access)

Below is a brief description of each function:

QM - Query Master Record. Used to query a Master Record on the PMSO database.

QI - Query Individual Position. Used to query an Individual Position within a Master Record on the PMSO database.

AM - Add Master Record. Used to establish a Master Record on the PMSO database.

AI - Add Individual Position. Used to establish an Individual Position within a Master Record on the PMSO database.

CM - Change Master Record. Used to change an existing Master Record.

CI - Change Individual Position. Used to change an existing Individual Position within a Master Record on the PMSO database.

DM - Delete/Restore Master Record. Used to delete an existing Master Record from the PMSO database when it is no longer needed, or restore a Master Record that was previously deleted.

DI - Delete/Restore Individual Position. Used to delete an existing Individual Position within a Master Record from the PMSO database when it is no longer needed, or restore an Individual Position that was previously deleted.



The deleted Master Record or Individual Position number remains on the PMSO database for the remainder of the fiscal year and can be viewed through the **Query Individual Position (QI)** option. Deleting a Master Record also deletes all Individual Positions linked to it. A Master Record cannot be deleted if any of the Individual Positions linked to it are occupied. An occupied Individual Position cannot be deleted.

The **Restore** function can be used to restore a deleted Master Record or Individual Position in order to (1) process cancelation actions and (2) process personnel actions that must be restored after the cancelation actions are successfully processed.

Whenever a previously deleted Individual Position number must be restored, a Master Record must also be present in PMSO. If the Master Record was previously deleted, the Master Record must be restored before the Individual Position number can be restored. Also, if more than one Individual Position number must be restored, the **DI** option must be used to restore each Individual Position number.

The restored Master Record and/or Individual Position number will remain on the PMSO database indefinitely. If the Master Record or Individual Position number must be deleted from the PMSO database after the cancelation processed is completed, use the **DM** option to delete the Master Record and use the **DI** option to delete the Individual Position number.

IM - Inactivate Master Record. Used to save a Master Record on the PMSO database in an inactive status.

II - Inactivate Individual Position. Used to save an Individual Position on the PMSO database in an inactive status.

The **IM** and **II** functions enable personnel offices to inactivate the Master Record or Individual Position quickly when the need arises. Inactive Master Records and Individual Positions do not appear on the PMSO report, Position Organization Listing (POL). It is important that users act timely when a job becomes vacant in order to maintain an accurate POL. An inactivated Master Record or Individual Position remains on the PMSO database for the remainder of the fiscal year. Inactivating a Master Record inactivates all Individual Positions linked to it. A Master Record cannot be inactivated if any of the individual positions linked to it are occupied. An occupied Individual Position cannot be inactivated.

RM - Reactivate Master Record. Used to reactivate a Master Record.

RI - Reactivate Individual Position. Used to reactivate an Individual Position.

HM - Help Master Record. Used to access the Help screens for a Master Record without using the **Add, Change, Delete, Inactivate, Reactivate,** or **Query** option.

HI - Help Individual Position. Used to access the Help screens for an Individual Position without using the **Add, Change, Delete, Inactivate, Reactivate,** or **Query** option.

PI - Position Inquiry. Used to display all Individual Positions established for a Master Record.



EX - Exit Position Management System. Used to exit the system.

This section includes the following topics:

Add Master Record (AM)	16
Add Individual Position (AI)	22
Change Master Record (CM) or Change Individual Position (CI)	33
Delete/Restore Master Record (DM) or Delete/Restore Individual Position (DI) ...	36
Inactivate Master Record (IM) or Inactivate Individual Position (II)	41
Reactivate Master Record (RM) or Reactivate Individual Position (RI)	44
Query Master Record (QM) or Query Individual Position (QI)	47
Help Master Record (HM) or Help Individual Position (HI)	49
Position Inquiry (PI)	51
Report Selection (SR)	52

Add Master Record (AM)

The Add Master Record option is option **AM** on the Position Management System Online screen. This option is used to add a Master Record to the PMSO database. To select this option, type **AM**. Press **Enter**. The Add Master Record screen is displayed.

PM00201M	<u>ADD MASTER RECORD</u>		03/14/12
1. FUNCTION <u>A</u>	2. DEPT-CD/AGCY-BUR-CD <u>AM</u>		(PF1=MENU)
3. SON	4. MR-NO	5. GRADE <u>00</u>	(PF5=HELP)
*****			(PF8=INDV)

1. PAY-PLAN	2. OCC-SER	<u>0000</u>	
3. OCC-FUNC-CD	4. OFF-TLE-PF/CD/SF		
5. OFF-TITLE			
6. HQ-FLD-CD	7. SUP-CD		
8. CLASS-STD-CD	9. INTERDIS-CD		
10. DT-CLASS	<u>00 00 00</u>	11. EARLY-RET-CD	<u>0</u>
12. INACT/ACT		13. DT-ABOL	<u>00 00 00</u>
14. DT-INACT/REACT	<u>00 00 00</u>	15. AGCY-USE	
16. INTERDIS-SER	<u>0000</u>	<u>0000</u>	<u>0000</u>
	<u>0000</u>	<u>0000</u>	<u>0000</u>
17. INTERDIS-PF/CD/SF			
18. PATCO-CD		19. PROF-CATEGORY	
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **			

Figure 12: Add Master Record Screen



Instructions follow for using this function.

The **Query Master Record** function should be selected first to inform the user of the Master Records that have been inactivated and deleted but are still on the PMSO database. If it becomes necessary to establish an unclassified Master Record, the user must enter the Department code, Agency/Bureau code, POI, and Master Record **888888**. The system does not require any other data.

Type data in the five key fields at the Master Record screen. The key fields are used to identify a specific Master Record and are displayed on each Master Record screen.

Complete the key fields as follows:

Field	Description/Instruction
1. Function	This field is system generated from the option selected on the Position Management System Online screen.
2. Dept-Cd/Agcy-Bur-Cd	Type the Department and the Agency or Bureau code.
3. SON	Type the Submitting Office Number (SON). This is also known as the POI.
4. MR-No	Type the Master Record number assigned by the Agency.
5. Grade	Type the Master Record grade level. If the grade is a single digit (1-9), it must be prefixed with a 0 (zero). For Senior Executive Service (SES) positions, type 00 . For pay plan EX , the grade must be 01-05 .

For the Office of the U.S. Attorneys, if the pay plan is **AD**, the grade must be **00-20**.

Once the key fields are entered, complete the applicable fields and tab through fields that are not applicable. If your equipment has the capability, required fields are highlighted on the screen.

Respond to the prompts as follows:

Field	Description/Instruction
1. Pay Plan	Type the applicable pay plan. For a list of valid pay plans, see TMGT Table 025, AD-350, Personnel Block and Description. Note: For the Federal Deposit Insurance Corporation (FDIC), if the pay plan is E , enter a space in the second position of the field. Note: For the Office of the U.S. Attorneys, if the pay plan is AD , the grade must be 00-20 .
2. OCC-Ser	Type the applicable occupational series code. For a list of valid occupational series codes, see TMGT Table 018, Occupational Series



Field	Description/Instruction
	<p>Alpha Description.</p> <hr/> <p>Note: For Smithsonian Institution (Trust), if the trust fund position is pay plan IS and has no assigned occupational series code, 9999 must be entered in this field.</p>
<p>3. OCC-Func-Cd</p>	<p>Type the applicable occupational function code. This field is required if the occupational series in Field 2 requires an occupational function code. For a list of occupational series codes that require entry of an occupational function code, see TMGT Table 018, Occupational Series Alpha Description.</p> <hr/> <p>Note: For Architect of the Capitol, the U.S. Senate Restaurants, the Library of Congress, the Congressional Budget Office, the Office of Technology Assessment, the Copyright Royalty Tribunal, the John C. Stennis Center for Public Service Training and Development, and Botanic Garden, this field is optional.</p>
<p>4. Off-Tle-PF/Cd/SF</p>	<p>Position 1 - Type the prefix code. If a prefix is not appropriate for the official title, no entry is required in this position. Tab to the next position. For a list of valid codes, see TMGT Table 075, Official Title Prefix and Suffix.</p> <p>Positions 2-5 - Type the four-digit official title code. For a list of valid values, see TMGT Table 074, Official Position Title.</p> <p>Position 6 - Type the suffix code. If a suffix is not appropriate for the official title, no entry is required in this position. For a list of valid codes, see TMGT Table 075, Office Title Prefix and Suffix.</p> <p>If TMGT Table 074, Official Position Title, does not contain a code covering a specific official title, 9999 must be entered with an appropriate title description. Agencies should periodically review the 9999 codes and change them to specific codes once they are established in TMGT. Use 8888 for pay plan ES. Any prefix or suffix may be used with the official title codes 8888 or 9999.</p>
<p>5. Off-Title</p>	<p>If code 8888 or 9999 is entered in Field 4, an entry is required in this field. If the official title code entered in Field 4 is in TMGT Table 074, Official Position Title, the applicable title is system generated in this field. For a list of valid codes and titles, see TMGT Table 074, Official Position Title.</p> <hr/> <p>Note: If a prefix or suffix code is entered in Field 4, the official title description is limited to 32 positions. If both a prefix and a suffix are entered, the official title description is limited to 26 positions.</p>
<p>6. Hq-Fld-Cd</p>	<p>Type the applicable code for a headquarters or field position.</p> <p>Valid values are:</p>



Field	Description/Instruction
	Code - Definition Blank - Not Needed 1 - Headquarters 2 - Field
7. Sup-Cd	Type the applicable supervisory code. Valid values are: 2 - Supervisor or Manager. Position requires the exercise of supervisory and/or managerial responsibilities that meet, at least, the minimum requirements for application of the General Schedule Supervisory Guide or similar standards of minimum supervisory responsibility specified by position classification standards or other directives of the applicable pay schedule or system. 4 - Supervisory (Civil Service Retirement Act (CSRA)). Position meets the definition of Supervisory in 5 U.S.C. 7103(a) (10) but does not meet the minimum requirements for application of the Supervisory Grade-Evaluation Guide. 5 - Management Official (CSRA). Position meets the definition of Management Official in 5 U.S.C. 7103(a) (11) but does not meet the Supervisory Grade-Evaluation Guide definition of Manager or Supervisor or the definition of Supervisor in 5 U.S.C. 7103(a)(10). 6 - Leader under Work Leader Grade Evaluation Guide. Position is titled with the prefix lead and meets the minimum requirements for application of the Work Leader Grade-Evaluation Guide, or meets similar minimum requirements for leader responsibilities specified by the job standards or other directives of the applicable pay schedule or system. 7 - Team Leader under General Schedule Leader Grade Evaluation Guide. 8 - All Other Positions. Position does not meet any of the above definitions.
8. Dt-Class	Classification Standard Code. Type X if the standard used to classify the position was issued after January 1, 1976; otherwise, leave this field blank. <hr/> Note: This field is completed only when a new standard is being implemented, and the field has been set to 0 (zero). To determine if the field is set to 0, check the Query Master Record screen for this field.
9. Interdis-Cd	Interdisciplinary Code. Type Y if the position is an interdisciplinary position. If Y is entered, Field 16 and Field 17 must be completed. If the position is an interdisciplinary position, leave blank and the system generates an N .
10. Dt-Class	Date Classified. Type the date in which the classification of the position is approved.



Field	Description/Instruction
11. Early-Ret-Cd	<p>Early Retirement Code. Type the applicable early retirement code to indicate if the position qualifies for early retirement. Valid values are:</p> <p>Code - Definition</p> <p>Blank - Not applicable</p> <p>1 - Primary Position. Primary duties are directly connected with the work for which special retirement provisions exist.</p> <p>2 - Secondary Position. A supervisory or administrative position which need not be directly involved in the work for which the special retirement provision exists but must be primarily in, and must meet, certain experience and qualification requirements involving the line of work.</p> <p>3 - Foreign Service Position</p>
12. Inact/Act	<p>Inactive/Active. A (Active) is system generated. No entry is required for add actions.</p>
13. Dt-Abol	<p>Date Abolished. No entry is required for add actions.</p>
14. Dt-Inact/React	<p>Date Inactivated or Reactivated. No entry is required for add actions.</p>
15. Agcy-Use	<p>Agency Use. This is multipurpose field into which Agencies may enter specific data.</p>
16. Interdis-Ser	<p>Interdisciplinary Title Prefix/Code/Suffix. If Y is entered in Field 9, type the applicable occupational series code for each type of position. Otherwise, entry in this field is optional. No less than 2, or more than 11 (including Field 2 of the Master Record), occupational series codes may be entered for 1 Master Record. If Field 9 is N, no entry is accepted in this field.</p>
17. Interdis-PF/Cd/SF	<p>Interdisciplinary Title Prefix/Code/Suffix. If Y is typed in Field 9, type the applicable interdisciplinary title prefix/code/suffix. If Field 9 is N, no entry is accepted in this field.</p> <p>Position 1. Type the prefix code. For valid codes, see TMGT Table 075, Official Title Prefix & Suffix. If a prefix is not appropriate for the interdisciplinary title, no entry is required in the first position.</p> <p>Tab to the next position.</p> <p>Position 2-5. Type the four-digit official title code applicable to the interdisciplinary occupational series code entered in Field 16.</p> <p>Position 6. Type the suffix code. For a list of valid codes, see TMGT Table 075, Official Title Prefix & Suffix. If a suffix is not appropriate for the interdisciplinary title, no entry is required in this position.</p>
	<p>No less than 2 and no more than 11 interdisciplinary title codes may be used. Each title code is matched to the interdisciplinary occupational series code, Field 2 and Field 16.</p>



Field	Description/Instruction
18. PATCO-Cd	Occupational Category Code. This field is system generated based on the occupational series code. Valid values are: Code - Definition P - Professional. Occupations that include a variety of professional positions. A - Administrative. Occupations that include a variety of administrative positions. T - Technical. Occupations that include a variety of technical positions. C - Clerical. Occupations that include a variety of clerical positions. O - Other. Occupations that include all other positions. B - Blue Collar. Occupations comprising the trades, crafts, and manual labor (unskilled, semiskilled, and skilled), including foreman and supervisory positions entailing trade, craft, or laboring experience and knowledge. M - Mixed Collar. Occupations that include a variety of integrated positions that may include both General Schedule and Federal Wage System duties. For the Professional, Administrative, Technical, Clerical, or Other (PATCO) code for an occupational series code, see TMGT Table 018, Occupational Series Alpha Description.
19. Prof-Category	Professional Category. Type the applicable professional category code. Valid values are: Code - Definition 1 - SES or equivalent 2 - Professional-audit related 3 - Professional-other 4 - Clerical support staff 5 - Wage 6 - Expert/consultant

After typing all applicable data, carefully check the screen. This data becomes part of the new Master Record. Press **Enter**. If the data does not pass system edits, an error message is displayed at the bottom of the screen. Correct the error and press **Enter**. After all edits are satisfied, the record is added and the message *Master Record Successfully Added* is displayed.

- To add another Master Record, change the key fields and other applicable fields and press **Enter**. The system edits the data as described above.
- To display the **Add Individual Position** screen at the **Add Master Record** screen, press **PF8**.



- To perform another function or exit the system, press the applicable function key listed on the screen.

Add Individual Position (AI)

Add Individual Position is option **AI** on the Position Management System Online screen. This option is used to add an Individual Position to the PMSO database. To select this option, type **AI**. Press **Enter**. The Add Individual Position screen is displayed.

PM00301M	ADD INDIVIDUAL POSITION		03/14/12
			(PF1=MENU)
1. FUNCTION <u>A</u>	2. DEPT-CD/AGCY-BUR-CD	<u>AM</u>	(PF5=HELP)
3. SON	4. MR-NO	5. GRADE <u>00</u>	6. IP-NO
*****			(PF7=MSTR)
1. FLSA-CD/PAY-TBL	2. FIN-DS/PROC-INTG	<u>0</u>	(CLR=EXIT)
3. POS-SCHED	4. POS-SENS/DRUG-TS		
5. COMP-LEV	6. WK-TITLE-CD		
7. WK-TITLE			
8. ORG-STR-CD	<u>00</u> <u>00</u> <u>0000</u>	<u>00</u> <u>00</u> <u>00</u> <u>00</u>	
9. VAC-REV-CD		10. TARGET-GD	<u>00</u>
11. LANG-REQ		12. PROJ-DTY-IND	
13. DUTY-STATION		14. BUS-CD/COPR-ST	
15. DT-LST-AUDIT	<u>00</u> <u>00</u> <u>00</u>	16. PAS-IND/LEO-IND	
17. DATE-EST	<u>00</u> <u>00</u> <u>00</u>	18. GD-BASIS-IND	
19. DT-REQ-REC	<u>00</u> <u>00</u> <u>00</u>	20. NTE-DT	<u>00</u> <u>00</u> <u>00</u>
21. POS-ST-BUD		22. MT-REV/CL-ACT-CD	
23. DT-EMP-ASGN	<u>00</u> <u>00</u> <u>00</u>	24. DT-ABOL	<u>00</u> <u>00</u> <u>00</u>
25. INACT/ACT		26. DT-INACT/REACT	<u>00</u> <u>00</u> <u>00</u>
27. ACCTG-STAT		28. INT-ASGN-SER	
29. AGCY-USE		30. OBLIG-SSN	
31. DT-VACATED	<u>00</u> <u>00</u> <u>00</u>	32. INCUMBENT-SSN	
** PLEASE FURNISH REQUIRED FIELDS AND PRESS -ENTER- **			

Figure 13: Add Individual Position Screen

Instructions follow for using this function:

Note: The **Query Individual Position** function and/or **Position Inquiry** function should be selected first to inform the user of the Individual Positions that have been inactivated and deleted but are still on the PMSO database.

Enter data in the six key fields at the Add Individual Position screen. The key fields are used to identify a specific Individual Position and are displayed on each Individual Position screen.

Use the following instructions to complete the key fields.

Field	Description/Instruction
1. Function	This field is system generated from the option selected on the Position Management System Online screen.



Field	Description/Instruction
2. Dept-Cd/Agcy-Bur-Cd	Type the Department and the Agency or Bureau code.
3. SON	Type the SON (POI).
4. MR-No	Type the Master Record number assigned by the Agency.
5. Grade	Type the Master Record grade level. If the grade is a single digit (1–9), it must be prefixed with a 0 (zero). For SES positions, type 00. For pay plan EX , the grade must be 01–05. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Note: For the Office of the U.S. Attorneys, if the pay plan is AD, the grade must be 00–20. </div>
6. IP-No	Type the Individual Position number assigned by the Agency.

Once the key fields are completed, complete the applicable fields and tab through fields that are not applicable. If your equipment has the capability, fields required to add an Individual Position are highlighted on the screen.

Respond to the prompts as follows:

Field	Description/Instruction
1. FLSA-Cd/Pay-Tbl	<p>FLSA Code. This field indicates if the position is exempt or nonexempt from the overtime provisions of the Fair Labor Standards Act (FLSA). Type the FLSA code in the first position of this field.</p> <p>Valid values are:</p> <p>Code - Definition</p> <p>E - Exempt. A position that is exempt from the minimum wage and overtime provisions of FLSA.</p> <p>N - Nonexempt. A position that is subject to the minimum wage and overtime provisions of FLSA.</p> <p>Pay Table Code. This field must be completed for all positions entitled to a special salary rate authorized under 5 U.S.C. 5305 (only for employees with pay rate determinant code 5, 6, E, F, or M). Type the applicable code. For a list of valid codes, see the Federal Personnel Manual and/or TMGT Table 029, Pay Table Rates.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Note: The Pay Table Code is required for positions whose official title suffix is B (data transcriber), C (official automation), T (typing), or Y (stenography), and the duty station State is 11 (District of Columbia). </div> <p>If the pay code is less than six characters, leave the remaining positions blank. If a pay table code is not valid for the position (not covered by 5 U.S.C 5305), leave positions 2 through 7 blank. The pay table code is entered based on the position's duty station, occupational series code,</p>



Field	Description/Instruction
	and grade.
2. Fin-DS/Proc-Intg	<p>Conflict of Interest or Financial Disclosure Required/Procurement Integrity Act Code. The financial disclosure-required field indicates whether the position requires the incumbent to file a conflict of interest statement or a financial disclosure statement. Type the applicable code.</p> <p>Valid values are:</p> <p>Code - Definition</p> <p>0 - No conflict of interest or financial disclosure statement required.</p> <p>3 - SF 278, Financial Disclosure Report, required.</p> <p>4 - SF 450, Executive Branch Personnel Confidential Financial Disclosure Report, required.</p> <p>5 - MSPB-849 required.</p> <p>6 - GPO-U.S. 069233 required.</p> <p>7 - SI-1085 required.</p> <p>Procurement Integrity Act Code. The Procurement Integrity Act code field indicates whether the position requires the incumbent to be trained/certified in accordance with the Procurement Integrity Act. Type the applicable code.</p> <p>Valid values are:</p> <p>Code - Definition</p> <p>Y - Yes. This position requires the incumbent to be trained/certified in accordance with the Procurement Integrity Act.</p> <p>N - No. This position does not require the incumbent to be trained/certified in accordance with the Procurement Integrity Act.</p>
3. POS-Sched	<p>Type the applicable position schedule code.</p> <p>Valid values are:</p> <p>Blank - Not Applicable. The Individual Position is competitive, and this field is not applicable.</p> <p>A - Schedule A. Positions other than those of a confidential or policy-determining character for which it is not practical to examine.</p> <p>B - Schedule B. Positions other than those of a confidential or policy-determining character for which it is not practical to examine. Appointment to these positions are subject to any noncompetitive examination that the Office of Personnel Management (OPM) may prescribe.</p> <p>C - Schedule C. Positions of a confidential or policy-determining character.</p> <p>0 (zero) - Positions in the excepted service, but not a Schedule A, B, or C authorization.</p> <hr/> <p>Note: For the Office of Technology Assessment and</p>



Field	Description/Instruction
	<p style="text-align: center;">Congressional Budget Office, enter 0 in this field.</p>
<p>4. Pos-Sens/Drug-Ts</p>	<p>Position Sensitivity Code. This field indicates whether or not an Individual Position is sensitive and the extent of the sensitivity. Type the applicable code.</p> <p>Valid values are:</p> <p>First Position</p> <p>Code - Description</p> <p>1 - Nonsensitive/low risk</p> <p>2 - Noncritical sensitive</p> <p>3 - Critical sensitive</p> <p>4 - Special sensitive</p> <p>5 - Moderate risk</p> <p>6 - High risk</p> <p>Second Position</p> <p>Code - Definition</p> <p>C - Computer-ADP</p> <p>N - Noncomputer-ADP</p> <hr/> <p>Note: If the occupational series code on the Master Record is 0332, 0334, or 0335, the second position of the position sensitivity code must be C (Computer-ADP).</p> <hr/> <p>Drug Testing Code. This field indicates whether or not the position requires the incumbent and/or applicant to be drug tested. Type the applicable code.</p> <p>Valid values are:</p> <p>Code - Definition</p> <p>N - No, the position does not require drug testing.</p> <p>A - Yes, the position is designated for drug testing of the incumbent and also applicants.</p> <p>U - Undesignated.</p> <p>Y - Yes, the position is designated for incumbent testing.</p> <p>C - Yes, the position is designated for drug testing for the incumbent because the position requires a commercial motor vehicle operator's license.</p> <p>If no entry is made, the system defaults to N for all users except the Department of Housing and Urban Development, the Library of Congress, the Copyright Royalty Tribunal, and the John C. Stennis Center of Public Service Training and Development. U is generated for these users.</p>



Field	Description/Instruction
<p>5. Comp-Lev</p>	<p>Competitive Level Code. This field identifies positions so alike as to be interchangeable during a reduction in force (RIF). Type the applicable competitive level code.</p> <hr/> <p>Note: For the Office of the Comptroller of the Currency, the Job Evaluation Plan (JEP) code must be entered in the first position of this field.</p> <hr/> <p>Valid values are: Code - Description 1 - FLSA-Nonexempt 2 - FLSA-Exempt/Non-Managerial 3 - FLSA-Exempt/Managerial</p> <p>If the JEP code is 1, Field 1 must be N. If the JEP code is 2 or 3, Field 1 must be E.</p>
<p>6. Wk-Title-Cd</p>	<p>Working Title Code. Type the applicable working title code. See TMGT Table 076, Working Position Title. If the table does not contain a code covering a specific working title, type 9999 in this field and Working Title in Field 7.</p>
<p>7. Wk-Title</p>	<p>Working Title. For Working Title Code 9999, type the working title code that describes the organizational or administrative title of the position. If the entry in Field 6 is listed in TMGT Table 076, Working Position Title, the working title is system generated in this field.</p>
<p>8. Org-Str-Cd</p>	<p>Organizational Structure Code. Type the applicable organizational structure code that identifies the location of an employee's position by each level of organizational structure. For a list of valid codes, see TMGT Table 005, Agency Organizational Structure.</p>
<p>9. Vac-Rev-Cd</p>	<p>Vacancy Review Code. Type the applicable vacancy review code that indicates the management process prior to refilling a vacant position. Grade changes take priority over series and title changes.</p> <p>Valid values are: Code - Definition 0 (zero) - Position action no vacancy. The applicable code for any action that does not involve the filling of a vacancy. A - No change. The applicable code for any action in which the vacant position did not change. B - Lower grade. The applicable code when the position replaces a vacant job that is at a higher grade level. C - Higher grade. The applicable code when the position replaces a vacant job that is at a lower grade level. D - Different title and/or series. The applicable code when the position</p>



Field	Description/Instruction
	being filled replaces a vacant job that has a different title and/or series. E - New position/new full-time equivalent (FTE). The applicable code when the position is new, is not in lieu of any vacant position, and increases the FTE of the immediate unit. This is not applicable when the FTE can be tracked to an abolished position in another unit.
10. Target-Gd	Position Target Grade. Type the applicable target grade when it is determined that an Individual Position is either overgraded or below full performance level. Valid values are grade levels within each Master Record pay plan. If the grade is a single digit (i.e., 1-9), prefix it with a zero.
11. Lang-Req	Language Required. Type the applicable code to identify the foreign language required in the position. For a list of valid codes, see the Federal Personnel Manual.
12. Proj-Dty-Ind	Projected Duties Indicator. Type Y if the position is classified on the basis of projected duties. A tickler report, Projected Duties Follow-up, is system generated 6 months after the Individual Position is filled. This report can also be requested for printing via the Remote Forms Queuing System (RFQS). If no entry is made, N is system generated in this field, and no report is generated.
13. Duty-Station	Duty Station. Type the State, city, and county codes in which the position is located. See the U.S. General Services Administration (GSA) Worldwide Geographic Location Code Guide for valid location codes. If the duty station is located outside one of the 50 States, type the 2-digit alpha country code in the State portion of the field and 3 zeros (000) in the county position of the field. For a list of valid codes, see TMGT Table 016, Geographical Location Codes with Names. If the geographical locator code is not found, contact the appropriate Agency personnel for assistance.
14. BUS-Cd/COPR-St	Bargaining Unit Status (BUS) Code/Customs Officer Pay Reform Act (COPR) Status. This field indicates if the position is eligible for coverage by a bargaining unit. Type the applicable BUS code. Valid values are: Code - Definition 7777 - Position is eligible but not in a bargaining unit. 8888 - Position is ineligible for inclusion in a bargaining unit. Last four digits of OLMR number - Position is represented by a bargaining unit. The Office of Labor Management Relations (OLMR) number is established by OPM and contained in the publication Union Representation in the Federal Government. <hr/> Note: The code does not indicate that the employee is or is not a union member; it indicates that the employee is or is not eligible to be a member. <hr/> For the Architect of the Capitol and Botanic Gardens, type 8888 in



Field	Description/Instruction
	<p>this field.</p> <p>COPR Status Code. This field identifies the eligibility of an employee covered and paid by the provisions of COPR. Type the last position, the applicable COPR Status Code.</p> <p>Valid values are:</p> <p>Code - Definition</p> <p>Y - Yes. The employee is eligible to be covered and paid by the provisions of COPR.</p> <p>N/Blank - No. The employee is not eligible to be covered and paid by the provisions of COPR.</p> <p>If Y is entered in the COPR-St field and the following criteria is met:</p> <p>Department code is TR.</p> <p>Agency code is AF.</p> <p>Occupational series code is 1801.</p> <p>Master Record Field 5 is CANINE or occupational series code is 1890.</p> <p>Field 1 must be E, Exempt.</p>
<p>15. Dt-Lst-Audit</p>	<p>Date Position Last Audited or Reviewed. This field identifies the date the individual was most recently audited or reviewed. The date is system generated in this field from Field 17.</p>
<p>16. Pas-Ind/LEO-Ind</p>	<p>Presidential Appointment Indicator/Law Enforcement Officer Indicator</p> <p>Presidential appointment with Senate Confirmation (PAS) Indicator. Type the applicable Presidential appointment indicator that identifies those Individual Positions that can only be filled by Presidential appointment and require approval of the U.S. Senate.</p> <p>Valid values are:</p> <p>Code - Definition</p> <p>0 (zero) - Not applicable</p> <p>1 - PAS, Presidential appointment, position</p> <p>LEO Indicator Code. Type the law enforcement officer (LEO) indicator to indicate that the position is classified as law enforcement under the Federal Employees Pay Comparability Act of 1990 (FEPCA).</p> <hr/> <p>Note: This field must be completed for all LEO positions to ensure correct pay entitlement.</p> <hr/> <p>Valid values are:</p> <p>Code - Definition</p> <p>Y - Yes. This position is classified as a LEO to be paid under 7K FLSA.</p> <p>A - Yes. This position is classified as a LEO to be paid under 7A FLSA.</p>



Field	Description/Instruction
	<p>N/Blank - No. This position is not classified as a law enforcement officer.</p> <p>Any change to the LEO indicator requires the processing of a personnel action to document the change in the Payroll/Personnel database. If the LEO indicator is changed, an error is automatically generated to inform the user a personnel action is needed.</p>
17. Date-Est	<p>Date Individual Position Established. Type the date that the Individual Position is established. If no entry is made, the date from the Master Record Field 10 is system generated in this field.</p>
18. Gd-Basis-Ind	<p>Grade Basis Indicator. Type the applicable grade basis indicator to show specific information regarding the classification to the position.</p> <p>Valid values are:</p> <p>Code - Definition</p> <p>Blank - Not applicable</p> <p>1 - Review when vacant.</p> <p>2 - Impact of the person.</p> <p>3 - Supervisory position supported by the General Schedule Supervisory Guide (GSSG).</p> <p>4 - Supervisory position supported by the program duties.</p> <p>5 - Research Grade Evaluation Guide.</p> <p>6 - Policy Analysis Grade Evaluation Guide.</p> <p>7 - Equipment Development Grade Evaluation Guide.</p> <p>8 - Agency Use.</p> <p>9 - Agency Use.</p> <p>A - Administrative.</p> <p>C - Core.</p> <p>F - Focal Point.</p>
19. Dt-Req-Rec	<p>Date Request Received. Type the date that the official request was received to establish an Individual Position.</p>
20. NTE-Dt	<p>Individual Position Not-to-Exceed Date. Type the Individual Position's not-to-exceed (NTE) date for positions that are temporary. Three months prior to the NTE date, a tickler report, Notification of Employees in Non-Pay Status with Expires NTE Dates, is system generated and sent to the classifier and management to notify them that the position's NTE date is approaching. This report can also be requested for printing through RFQS.</p> <hr/> <p>Note: If N is entered in Field 21, this field must be completed. If Field 21 is Y, no entry is accepted.</p> <hr/>



Field	Description/Instruction
21. Pos-St-Bud	Position Status Budget. This field indicates whether or not the Individual Position is permanent. The information is for budgetary purposes. If the position is permanent, type Y ; if the position is other than permanent, type N .
22. Mt-Rev/CL-Act-Cd	Maintenance Review/Classification Action Code. Type the applicable code that indicates the classification action taken on the Individual Position. The first digit indicates whether the classification review occurred during normal work or as part of the maintenance review. This digit also indicates audit or paper review. The second digit describes the specific results of the classification review. Valid values are: First Digit Classification Action Code - Definition Normal 1 - Desk audit 2 - Supervisory audit 3 - Paper review 4 - Personnel Management Evaluation (PME)/Activity review/Maintenance Review 5 - Desk audit 6 - Supervisory audit 7 - Paper review 8 - Panel review Second Digit Results Code - Definition Results 1 - No action required 2 - Minor description changes; no effect on position titles, occupational series code, or grade 3 - Rewrite or new position description required 4 - Position title change 5 - Occupational series code change 6 - Position upgraded 7 - Position downgraded 8 - New position (1st digit must be 2 or 3) 9 - Other
23. Dt-Emp-Asgn	Date Employee Assigned. When an employee is assigned to the



Field	Description/Instruction
	position, this field is system generated with the effective date of the personnel action. No entry is required.
24. Dt-Abol	Individual Position Abolish Date. No entry is required for add actions.
25. Inact/Act	Individual Position Inactive/Active. A (Active) is system generated. No entry is required for add actions.
26. Dt-Inact/React	Individual Position Date Inactivated/Reactivated. No entry is required.
27. Acctg-Stat	Accounting Station Code. Type the Agency assigned accounting station code. The system generates the accounting station code for the following Bureau/Agency codes: 33-56-63-71-AE 51-57-64-72-AQ 52-58-65-73-AR 53-59-66-77-AT 54-61-67-93-AU 55-62-70-97
28. Int-Asgn/React	Interdisciplinary Assigned Series. When Field 9 of the Master Record is Y , type the specific occupational series code of an interdisciplinary Individual Position based on the incumbent's qualifications, as determined by the servicing personnel office. The occupational series code must also be present in Field 2 and Field 16 of the Master Record.
29. Agcy-Use	Agency Use. This is a multipurpose field into which Agencies may enter Agency-specific data.
30. Oblig-SSN	Obligated Social Security Number. No entry is required for add actions. This field is system generated with the Social Security number (SSN) of the employee when a personnel action is processed to temporarily promote the employee from the position or detail him/her to the position.
31. Dt-Vacated	Date Vacated. No entry is required for add actions. This field is system generated with the date on which the Individual Position was most recently vacated. This date is maintained as long as the Individual Position is vacant.
32. Incumbent-SSN	Incumbent Social Security Number. No entry is required for add actions. This field is system generated from PPS with the SSN of the employee occupying the position or the employee detailed from the Individual Position when the personnel action is processed.

After entering all applicable data, carefully check the screen. This data becomes part of a new Individual Position. Press **Enter**. If the data does not pass system edits, an error message is displayed at the bottom of the screen. Correct the error and press **Enter**. After all edits are satisfied, the position is added and the message *Individual Position Successfully Added* is displayed.



- To add Individual Positions to the same Master Record, change the Individual Position number and other necessary data change(s) and press **Enter**. The system edits the data as described above. Repeat this process until all Individual Positions are entered.
- To display the **Add Master Record** screen at the Add Individual Position screen, press **PF7**.
- To perform another function or exit the system, press the applicable function key listed on the screen.



Change Master Record (CM) or Change Individual Position (CI)

Change Master Record is option **CM**, and Change Individual Position is option **CI** on the Position Management System Online screen. These options are used to change an existing Master Record or Individual Position. To select one of these options, type **CM** or **CI**. Press **Enter**. The Change Master Record or Change Individual Position screen is displayed.

PM00201M	<u>CHANGE MASTER RECORD</u>				03/14/12
					(PF1=MENU)
1. FUNCTION <u>C</u>	2. DEPT-CD/AGCY-BUR-CD	<u>AM</u>			(PF5=HELP)
3. SON	4. MR-NO	5. GRADE	<u>00</u>		(PF8=INDV)
*****					(CLR=EXIT)
1. PAY-PLAN		2. OCC-SER	<u>0000</u>		
3. OCC-FUNC-CD		4. OFF-TLE-PF/CD/SF			
5. OFF-TITLE		7. SUP-CD			
6. HQ-FLD-CD		9. INTERDIS-CD			
8. CLASS-STD-CD		11. EARLY-RET-CD	<u>0</u>		
10. DT-CLASS	<u>00 00 00</u>	13. DT-ABOL	<u>00 00 00</u>		
12. INACT/ACT		15. AGCY-USE			
14. DT-INACT/REACT	<u>00 00 00</u>		<u>0000</u>	<u>0000</u>	<u>0000</u>
16. INTERDIS-SER	<u>0000</u>		<u>0000</u>	<u>0000</u>	<u>0000</u>
			<u>0000</u>	<u>0000</u>	<u>0000</u>
17. INTERDIS-PF/CD/SF					
18. PATCO-CD		19. PROF-CATEGORY			
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **					

Figure 14: Change Master Record Screen



```

PM00301M          CHANGE  INDIVIDUAL  POSITION          03/14/12
                                     (PF1=MENU)
1. FUNCTION C    2. DEPT-CD/AGCY-BUR-CD                (PF5=HELP)
3. SON          4. MR-NO          5. GRADE 00  6. IP-NO    (PF7=MSTR)
*****
1. FLSA-CD/PAY-TBL          2. FIN-DS/PROC-INTG  @    (PF8=NEXT)
3. POS-SCHED                4. POS-SENS/DRUG-TS
5. COMP-LEV                  6. WK-TITLE-CD
7. WK-TITLE
8. ORG-STR-CD              00  00  0000  00  00  00  00
9. VAC-REV-CD              10. TARGET-GD              00
11. LANG-REQ              12. PROJ-DTY-IND
13. DUTY-STATION          14. BUS-CD/COPR-ST
15. DT-LST-AUDIT          00  00  00          16. PAS-IND/LEO-IND
17. DATE-EST              00  00  00          18. GD-BASIS-IND
19. DT-REQ-REC            00  00  00          20. NTE-DT              00  00  00
21. POS-ST-BUD
23. DT-EMP-ASGN           00  00  00          22. MT-REV/CL-ACT-CD
25. INACT/ACT              26. DT-INACT/REACT        00  00  00
27. ACCTG-STAT            28. INT-ASGN-SER
29. AGCY-USE              30. OBLIG-SSN
31. DT-VACATED            00  00  00          32. INCUMBENT-SSN

** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **

```

Figure 15: Change Individual Position Screen

Complete the applicable key fields (1 through 6) using the instructions under *Add Master Record (AM)* (on page 16) or *Add Individual Position (AI)* (on page 22). Press **Enter**. The selected Master Record or Individual Position is displayed as it exists on the PMSO database.

If the Master Record or Individual Position selected is not on the PMSO database, the message *Master Record Not Found - Check Key Fields* or *Individual Position Not Found - Check Key Fields* is displayed. The cursor returns to the Department Code field, and you can select another Master Record or Individual Position and press **Enter**.

To change a Master Record, use the instructions for *Add Master Record (AM)* (on page 16). The following fields cannot be changed:

Field No. - Field Title

12 - Inact/Act (Inactive/Active)

13 - Dt-Abol (Date Abolished)

14 - Dt-Inact/React (Date Inactivated or Reactivated)

An active Master Record displays an **A** in Field 12. An inactive Master Record displays an **I** in Field 12 and the date inactivated in Field 14. If the Master Record is abolished, Field 13 contains a date.



Note: Master Record key fields (1-5) and Individual Position key fields (1-6) cannot be changed when using the **CM** or **CI** option.

To change an Individual Position, use the instructions for **Add Individual Position (AI)** (on page 22). The following fields cannot be changed:

Field No. - Field Title

23 - Dt-Emp-Asgn (Date Employee Assigned)*

24 - Dt-Abol (Individual Position Abolish Date)

25 - Inact/Act (Individual Position Inactive/Active)

26 - Dt-Inact/React (Date Inactivated/Reactivated)

*This field is system generated from PPS.

An active Individual Position has **A** in Field 25, Inact/Act. An inactive Individual Position has **I** in Field 25 and the date inactivated in Field 26. If the Individual Position is abolished, Field 24 contains a date.

When Field 22 of an Individual Position is completed, Field 15 of the Individual Position must also be completed with the date the position was recently audited or reviewed.

When Fields 4 and 5 of the Master Record and Field 4 of the Individual Position are changed, an Standard Form (SF) 50B, Notification of Personnel Action, is automatically generated with Nature of Action Code (NOAC) 903, Change in PMSO Element. The action will have the same effective date as the date of the change in PMSO. If the change occurs during the first week of the pay period, the action will go to the future file until the first processing of PINE for that pay period; if the change is made during the second week of the pay period, the action will generate with the processing of PINE each night.

If other fields are changed at the same time as Position-Sensitivity-Code, Position-Title-Code, or Official Title then a message will appear indicating that a personnel action must be processed. If a Central Personnel Data File (CPDF) data element is changing (e.g., pay plan, occupational series code, etc.) in conjunction with position sensitivity code, position title (including prefix, title code, and suffix), OPM requires that the appropriate NOAC (e.g., reassignment, change in data element, etc.) be processed. Therefore, in these instances, an NOAC 903, Change in PMSO Element, will not be system generated, and the Agencies must process the appropriate NOAC.

After typing all applicable data, carefully check the screen. This data become part of a modified Master Record or Individual Position. Press **Enter**. If the data does not pass system edits, an error message is displayed at the bottom of the screen. Correct the error and press **Enter**. After all edits are satisfied, the record is changed, and the message *Master Record Successfully Changed, Individual Position Successfully Changed, Master Record Successfully Modified - Personnel Action Required, Individual Position Successfully Changed - Personnel Action Required, or Individual Position Successfully Modified - Personnel Action Required* is displayed.



- To change another Master Record or Individual Position, change the applicable key fields and press **Enter**; the new selected Master Record or Individual Position is displayed. Type the changes and press **Enter**. The system edits the data as described above.
- To display the Change Individual Position screen at the Change Master Record screen, press **PF8**.
- To scroll forward through the Individual Position screens, press **PF8**.
- To display the Change Master Record screen at the Change Individual Position screen, press **PF7**.
- To perform another function or exit the system, press the applicable function key listed on the screen.

Delete/Restore Master Record (DM) or Delete/Restore Individual Position (DI)

Delete/Restore Master Record is option **DM** and Delete/Restore Individual Position is option **DI** on the Position Management System Online screen. These options are used to delete an existing Master Record or Individual Position or restore a Master Record or Individual Position that was previously deleted.

Note: A Master Record cannot be deleted if any of the Individual Positions linked to it are occupied. An occupied Individual Position cannot be deleted.

The restore function should be used to restore a deleted Master Record or Individual Position in order to (1) process cancellation actions and (2) process personnel actions that must be restored after the cancellation actions are successfully processed.



Delete Master Record or Individual Position

To select this option from the Position Management System Online screen, type **DM** or **DI**. Press **Enter**. The Delete/Rstr Master Record or Delete/Rstr Individual Position screen is displayed.

PM00201M	<u>DELETE/RSTR MASTER RECORD</u>					03/14/12
1. FUNCTION <u>D</u>	2. DEPT-CD/AGCY-BUR-CD				<u>(PF1=MENU)</u>	
3. SON	4. MR-NO		5. GRADE <u>00</u>		<u>(PF5=HELP)</u>	
*****						<u>(PF8=INDV)</u>
*****						<u>(CLR=EXIT)</u>
1. PAY-PLAN	2. OCC-SER			<u>0000</u>		
3. OCC-FUNC-CD	4. OFF-TLE-PF/CD/SF					
5. OFF-TITLE	7. SUP-CD					
6. HQ-FLD-CD	9. INTERDIS-CD					
8. CLASS-STD-CD	11. EARLY-RET-CD			<u>0</u>		
10. DT-CLASS	<u>00</u>	<u>00</u>	<u>00</u>	13. DT-ABOL		
12. INACT/ACT	15. AGCY-USE			<u>00</u> <u>00</u> <u>00</u>		
14. DT-INACT/REACT	<u>00</u>	<u>00</u>	<u>00</u>			
16. INTERDIS-SER	<u>0000</u>	<u>0000</u>	<u>0000</u>	<u>0000</u>	<u>0000</u>	<u>0000</u>
	<u>0000</u>	<u>0000</u>	<u>0000</u>	<u>0000</u>	<u>0000</u>	<u>0000</u>
17. INTERDIS-PF/CD/SF						
18. PATCO-CD	19. PROF-CATEGORY					
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **						

Figure 16: Delete/RSTR Master Record Screen

PM00301M	<u>DELETE/RSTR INDIVIDUAL POSITION</u>					03/14/12
1. FUNCTION <u>D</u>	2. DEPT-CD/AGCY-BUR-CD				<u>(PF1=MENU)</u>	
3. SON	4. MR-NO		5. GRADE <u>00</u>		6. IP-NO	
*****						<u>(PF5=HELP)</u>
*****						<u>(PF7=MSTR)</u>
*****						<u>(PF8=NEXT)</u>
*****						<u>(CLR=EXIT)</u>
1. FLSA-CD/PAY-TBL	2. FIN-DS/PROC-INTG			<u>0</u>		
3. POS-SCHED	4. POS-SENS/DRUG-TS					
5. COMP-LEV	6. WK-TITLE-CD					
7. WK-TITLE	10. TARGET-GD			<u>00</u>		
8. ORG-STR-CD	<u>00</u>	<u>00</u>	<u>0000</u>	<u>00</u>	<u>00</u>	<u>00</u>
9. VAC-REV-CD	12. PROJ-DTY-IND					
11. LANG-REQ	14. BUS-CD/COPR-ST					
13. DUTY-STATION	16. PAS-IND/LEO-IND					
15. DT-LST-AUDIT	<u>00</u>	<u>00</u>	<u>00</u>	18. GD-BASIS-IND		
17. DATE-EST	<u>00</u>	<u>00</u>	<u>00</u>	20. NTE-DT		
19. DT-REQ-REC	<u>00</u>	<u>00</u>	<u>00</u>	<u>00</u> <u>00</u> <u>00</u>		
21. POS-ST-BUD	22. MT-REV/CL-ACT-CD					
23. DT-EMP-ASGN	<u>00</u>	<u>00</u>	<u>00</u>	24. DT-ABOL		
25. INACT/ACT	26. DT-INACT/REACT			<u>00</u> <u>00</u> <u>00</u>		
27. ACCTG-STAT	28. INT-ASGN-SER					
29. AGCY-USE	30. OBLIG-SSN					
31. DT-VACATED	<u>00</u>	<u>00</u>	<u>00</u>	32. INCUMBENT-SSN		
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **						

Figure 17: Delete/RSTR Individual Position Screen



Complete the applicable fields (1 through 6) using the instructions for **Add Master Record (AM)** (on page 16) or **Add Individual Position (AI)** (on page 22). Press **Enter**. The selected Master Record or Individual Position screen is displayed.

If the Master Record or Individual Position selected is not on the PMSO database, the message *Master Record Not Found - Check Key Fields* or *Individual Position Not Found - Check Key Fields* is displayed. The cursor returns to the Department Code field, and you can select another Master Record or Individual Position and press **Enter**.

The cursor moves to Field 13 on the Master Record screen and Field 24 on the Individual Position screen. The message *Enter Date to Delete/Enter Zeros to Restore Master Record* or *Enter Date to Delete/Enter Zeros to Restore Individual Position* is displayed. Type the applicable date to delete the Master Record. Press **Enter**. *D* is system generated in Field 12 on the Master Record screen or Field 25 on the Individual Position screen.

If the data does not pass system edits, an error message is displayed at the bottom of the screen. Correct the error and press **Enter**. If the Individual Position is occupied, the message *Individual Position Filled - Action Rejected* is displayed. After all edits are satisfied, the record is deleted, and the message *Master Record Successfully Abolished* or *Individual Position Successfully Abolished* is displayed. The Master Record or Individual Position is deleted immediately regardless of the date entered. No other entry is required.

A deleted Master Record or Individual Position number remains on the PMSO database for the remainder of the fiscal year and can be viewed through the **Query Master Record (QM)** or **Query Individual Position (QI)** option. Deleting a Master Record deletes all Individual Positions linked to it.

- To delete another Master Record or Individual Position, change the applicable key fields and press **Enter**; the new selected Master Record or Individual Position is displayed. Type the applicable fields and press **Enter**. The system edits the data as described above.
- To display the Delete Individual Position screen at the Delete Master Record, press **PF8**.
- To scroll forward through the individual screens, press **PF8**.
- To display the Delete Master Record screen at the Delete Individual Position screen, press **PF7**.
- To perform another function or exit the system, press the applicable function key listed on the screen.

Restore Master Record or Individual Position

To select this option, type **DM** or **DI**. Press **Enter**. The Delete/Rstr Master Record or Delete/Rstr Individual Position screen is displayed.



The **Restore** function should be used to restore a deleted Master Record or Individual Position in order to (1) process cancelation actions and (2) process personnel actions that must be restored after the cancelation actions are successfully processed.

Whenever a previously deleted Individual Position number must be restored, a Master Record must also be present in PMSO. If the Master Record was previously deleted, the Master Record must be restored **before** the Individual Position number can be restored. Also, if more than one Individual Position number must be restored, the **DI** option must be used to restore **each** Individual Position number.

Note: The restored Master Record and/or Individual Position number will remain on the PMSO database indefinitely. If the Master Record or Individual Position number must be deleted from the PMSO database after the cancelation processed is completed, use the **DM** option to delete the Master Record and use the **DI** option to delete the Individual Position number.

Complete the applicable key fields (1 through 6) using the instructions under **Add Master Record (AM)** (on page 16) or **Add Individual Position (AI)** (on page 22). Press **Enter**. The selected Master Record or Individual Position is displayed as it exists on the PMSO database.

If the Master Record or Individual Position selected is not on the PMSO database, the message *Master Record Not Found - Check Key Fields* or *Individual Position Not Found - Check Fields* is displayed. The cursor returns to the Department Code field, and you can select another Master Record or Individual Position and press **Enter**.

The cursor moves to Field 13 on the Master Record screen and Field 24 on the Individual Position screen. The message *Enter Date to Delete/Enter Zeros to Restore Master Record* is displayed. Type **000000** (six zeros). Press **Enter**. **A** is system generated in Field 12 on the Master Record screen and Field 25 on the Individual Position screen.

If the data does not pass system edits, an error message is displayed at the bottom of the screen. Correct the error and press **Enter**. After all edits are satisfied, the record is restored, and the message *Master Record Successfully Restored* or *Individual Position Successfully Restored* is displayed. The Master Record or Individual Position is restored immediately. No other entry is required.

- To restore another Master Record or Individual Position, change the applicable key fields and press **Enter**; the new selected Master Record or Individual Position is displayed. Type data in the applicable fields and press **Enter**. The system edits the data as described above.
- To display the Delete/Restore Individual Position screen at the Delete/Rstr Master Record screen, press **PF8**.
- To scroll forward through the Individual Position screens, press **PF8**.
- To display the Delete/Restore Master Record screen at the Delete/Rstr Individual Position screen, press **PF7**.



- To perform another function or exit the system, press the applicable function key listed on the screen.



Inactivate Master Record (IM) or Inactivate Individual Position (II)

Inactive Master Record is option **IM**, and Inactive Individual Position is option **II** on the Position Management System Online screen. This option is used to save a Master Record or Individual Position on the PMSO database in an inactive status. To select this option, Type **IM** or **II**. Press **Enter**. The Inactive Master Record or Inactive Individual Position screen is displayed.

PM00201M	<u>INACTIVATE MASTER RECORD</u>				03/14/12
					(PF1=MENU)
1. FUNCTION <u>I</u>	2. DEPT-CD/AGCY-BUR-CD				(PF5=HELP)
3. SON	4. MR-NO	5. GRADE	00		(PF8=INDV)
*****					(CLR=EXIT)
1. PAY-PLAN		2. OCC-SER	0000		
3. OCC-FUNC-CD		4. OFF-TLE-PF/CD/SF			
5. OFF-TITLE					
6. HQ-FLD-CD		7. SUP-CD			
8. CLASS-STD-CD		9. INTERDIS-CD			
10. DT-CLASS	00 00 00	11. EARLY-RET-CD	0		
12. INACT/ACT		13. DT-ABOL	00 00 00		
14. DT-INACT/REACT	00 00 00	15. AGCY-USE			
16. INTERDIS-SER	0000	0000	0000	0000	0000
	0000	0000	0000	0000	0000
17. INTERDIS-PF/CD/SF					
18. PATCO-CD		19. PROF-CATEGORY			
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **					

Figure 18: Inactivate Master Record Screen



PM00301M	INACTIVATE		INDIVIDUAL	POSITION	03/14/12
					(PF1=MENU)
1. FUNCTION I	2. DEPT-CD/AGCY-BUR-CD				(PF5=HELP)
3. SON	4. MR-NO	5. GRADE 00	6. IP-NO	(PF7=MSTR)	
*****					(PF8=NEXT)
1. FLSA-CD/PAY-TBL			2. FIN-DS/PROC-INTG	0	(CLR=EXIT)
3. POS-SCHED			4. POS-SENS/DRUG-TS		
5. COMP-LEV			6. WK-TITLE-CD		
7. WK-TITLE					
8. ORG-STR-CD	00	00	0000	00	00 00 00
9. VAC-REV-CD			10. TARGET-GD	00	
11. LANG-REQ			12. PROJ-DTY-IND		
13. DUTY-STATION			14. BUS-CD/COPR-ST		
15. DT-LST-AUDIT	00	00	00	16. PAS-IND/LEO-IND	
17. DATE-EST	00	00	00	18. GD-BASIS-IND	
19. DT-REQ-REC	00	00	00	20. NTE-DT	00 00 00
21. POS-ST-BUD			22. MT-REV/CL-ACT-CD		
23. DT-EMP-ASGN	00	00	00	24. DT-ABOL	00 00 00
25. INACT/ACT			26. DT-INACT/REACT	00	00 00
27. ACCTG-STAT			28. INT-ASGN-SER		
29. AGCY-USE			30. OBLIG-SSN		
31. DT-VACATED	00	00	00	32. INCUMBENT-SSN	
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **					

Figure 19: Inactivate Individual Position Screen

Complete the applicable key fields (1 through 6) using the instructions under *Add Master Record (AM)* (on page 16) or *Add Individual Position (AI)* (on page 22). Press **Enter**. The selected Master Record or Individual Position is displayed as it exists in the PMSO database.

If the Master Record or Individual Position selected is not on the PMSO database, the message *Master Record Not Found - Check Key Fields* or *Individual Position Not Found - Check Key Fields* is displayed. The cursor returns to the Department Code field, and you can select another Master Record or Individual Position and press **Enter**.

The cursor moves to Field 14 on the Master Record screen and the Field 26 on the Individual Position screen. The message *Enter Date and Press - Enter - To Inactivate* is displayed. If the Master Record or Individual Position is to be inactivated on the current date, no entry is required; press **Enter**. The current date is system generated in this field. If the current date is not appropriate, type a past or future date. Press **Enter**. **I** is system generated in Field 12 on the Master Record screen and Field 25 on the Individual Position screen. The Master Record or Individual Position is inactivated immediately regardless of the date entered. No other entry is required.

An unoccupied Master Record or Individual Position number is automatically inactivated 9 months after it is vacated. The inactivated Master Record or Individual Position number remains on the PMSO database for the remainder of the fiscal year and can be viewed through the *Query Master Record (QM)* or the *Query Individual Position (QI)* option. Inactivating a Master Record inactivates all Individual Positions linked to it. A Master Record cannot be inactivated if any of the Individual Positions linked to it are occupied. An occupied Individual Position cannot be inactivated.



After typing all applicable data, press **Enter**. If the data does not pass system edits, an error message is displayed at the bottom of the screen. Correct the error and press **Enter**. If the Individual Position is occupied, the message *Individual Position Filled - Action Rejected* is displayed. After all edits are satisfied, the record is inactivated, and the message *Master Record Successfully Inactivated* or *Individual Position Successfully Inactivated* is displayed.

- To inactivate another Master Record or Individual Position, change the applicable key fields and press **Enter**; the new selected Master Record or Individual Position is displayed. Type data in the applicable fields and press **Enter**. The system edits the data as described above.
- To display the Inactive Individual Position screen at the Inactivate Master Record screen, press **PF8**.
- To scroll forward through the Individual Position screens, press **PF8**.
- To display Inactivate Master Record screen at the Inactivate Individual Position screen, press **PF7**.
- To perform another function or exit the system, press the applicable function key listed on the screen.



Reactivate Master Record (RM) or Reactivate Individual Position (RI)

Reactivate Master Record is option **RM** and Reactivate Individual Position is option **RI** on the Position Management System Online screen. This option is used to reactivate a Master Record or Individual Position. To select this option, type **RM** or **RI**. Press **Enter**. The Reactivate Master Record or Reactivate Individual Position screen is displayed.

PM00201M	REACTIVATE MASTER RECORD		03/14/12	
				(PF1=MENU)
1. FUNCTION <u>R</u>	2. DEPT-CD/AGCY-BUR-CD			(PF5=HELP)
3. SON	4. MR-NO	5. GRADE <u>00</u>		(PF8=INDV)
*****				(CLR=EXIT)
1. PAY-PLAN		2. OCC-SER	<u>0000</u>	
3. OCC-FUNC-CD		4. OFF-TLE-PF/CD/SF		
5. OFF-TITLE		7. SUP-CD		
6. HQ-FLD-CD		9. INTERDIS-CD		
8. CLASS-STD-CD		11. EARLY-RET-CD	<u>0</u>	
10. DT-CLASS	<u>00 00 00</u>	13. DT-ABOL	<u>00 00 00</u>	
12. INACT/ACT		15. AGCY-USE		
14. DT-INACT/REACT	<u>00 00 00</u>			
16. INTERDIS-SER	<u>0000</u>	<u>0000</u>	<u>0000</u>	<u>0000</u>
	<u>0000</u>	<u>0000</u>	<u>0000</u>	<u>0000</u>
17. INTERDIS-PF/CD/SF				
18. PATCO-CD		19. PROF-CATEGORY		
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **				

Figure 20: Reactive Master Record Screen



PM00301M	REACTIVATE INDIVIDUAL POSITION				03/14/12
1. FUNCTION R	2. DEPT-CD/AGCY-BUR-CD				(PF1=MENU)
3. SON	4. MR-NO		5. GRADE 00	6. IP-NO	(PF5=HELP)
*****					(PF7=MSTR)
1. FLSA-CD/PAY-TBL			2. FIN-DS/PROC-INTG 0		(PF8=EXT)
3. POS-SCHED			4. POS-SENS/DRUG-TS		(CLR=EXIT)
5. COMP-LEV			6. WK-TITLE-CD		
7. WK-TITLE					
8. ORG-STR-CD	00	00	0000	00 00 00	
9. VAC-REV-CD			10. TARGET-GD	00	
11. LANG-REQ			12. PROJ-DTY-IND		
13. DUTY-STATION			14. BUS-CD/COPR-ST		
15. DT-LST-AUDIT	00	00	00		
17. DATE-EST	00	00	00		
19. DT-REQ-REC	00	00	00		
21. POS-ST-BUD			20. NTE-DT	00 00 00	
23. DT-EMP-ASGN	00	00	00		
25. INACT/ACT			22. MT-REV/CL-ACT-CD		
27. ACCTG-STAT			24. DT-ABOL	00 00 00	
29. AGCY-USE			26. DT-INACT/REACT	00 00 00	
31. DT-VACATED	00	00	00		
				28. INT-ASGN-SER	
				30. OBLIG-SSN	
				32. INCUMBENT-SSN	
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **					

Figure 21: Reactivate Individual Position Screen

Complete the applicable key fields (1 through 6) using the instructions under *Add Master Record (AM)* (on page 16) or *Add Individual Position (AI)* (on page 22). If your equipment has the capability, fields required to inactivate a Master Record or Individual Position are highlighted on the screen. Press **Enter**. The selected Master Record or Individual Position is displayed as it exists on the PMSO database.

If the Master Record or Individual Position selected is not on the PMSO database, the message *Master Record Not Found - Check Key Fields* or *Individual Position Not Found - Check Key Fields* is displayed. The cursor returns to the Department Code field, and you can select another Master Record or Individual Position and press **Enter**.

The cursor moves to Field 14 on the Master Record screen and Field 26 on the Individual Position screen. The message *Enter Date and Press - Enter - To Reactivate* is displayed. If the Master Record or Individual Position is to be reactivated on the current date, no entry is required; press **Enter**. The current date is system generated in this field. If the current date is not appropriate, type a past or future date. Press **Enter**. **A** is system generated in Field 12 on the Master Record screen and Field 25 on the Individual Position screen. The Master Record or Individual Position is reactivated immediately regardless of the date entered. No other entry is required.

After typing all applicable data, press **Enter**. If the data does not pass system edits, an error message is displayed at the bottom of the screen. Correct the error and press **Enter**. After all edits are satisfied, the record is reactivated and the message *Master Record Successfully Reactivated* or *Individual Position Successfully Reactivated* is displayed.



- To reactivate another Master Record or Individual Position, change the applicable key fields and press **Enter**; the new selected Master Record or Individual Position is displayed. Type the applicable fields and press **Enter**. The system edits the data as described above.
- To display the Reactivate Individual Position screen at the Reactivate Master Record screen, press **PF8**.
- To scroll forward through the Individual Position screens, press **PF8**.
- To display the Reactivate Master Record screen at the Reactivate Individual Position screen, press **PF7**.
- To perform another function or exit the system, press the applicable function key listed on the screen.



Query Master Record (QM) or Query Individual Position (QI)

Query Master Record is option **QM** and Query Individual Position is option **QI** on the Position Management System Online screen. This option is used to query a Master Record or Individual Position. To select this option type **QM** or **QI**. Press **Enter**. The Query Master Record or Query Individual Position screen is displayed.

PM00201M	<u>QUERY MASTER RECORD</u>				03/14/12
					(PF1=MENU)
1. FUNCTION <u>Q</u>	2. DEPT-CD/AGCY-BUR-CD				(PF5=HELP)
3. SON	4. MR-NO	5. GRADE		00	(PF8=INDV)

1. PAY-PLAN	2. OCC-SER				0000
3. OCC-FUNC-CD	4. OFF-TLE-PF/CD/SF				
5. OFF-TITLE	7. SUP-CD				
6. HQ-FLD-CD	9. INTERDIS-CD				
8. CLASS-STD-CD	11. EARLY-RET-CD				0
10. DT-CLASS	00	00	00		
12. INACT/ACT	13. DT-ABOL				00 00 00
14. DT-INACT/REACT	00	00	00		
16. INTERDIS-SER	0000	0000	0000	0000	0000
	0000	0000	0000	0000	0000
17. INTERDIS-PF/CD/SF					
18. PATCO-CD	19. PROF-CATEGORY				
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **					

Figure 22: Query Master Record Screen



PM00301M	QUERY	INDIVIDUAL	POSITION	03/14/12
1. FUNCTION Q	2. DEPT-CD/AGCY-BUR-CD			(PF1=MENU)
3. SON	4. MR-NO	5. GRADE 00	6. IP-NO	(PF5=HELP)
*****				(PF7=MSTR)
*****				(PF8=NEXT)
1. FLSA-CD/PAY-TBL		2. FIN-DS/PROC-INTG	0	(CLR=EXIT)
3. POS-SCHED		4. POS-SENS/DRUG-TS		
5. COMP-LEV		6. WK-TITLE-CD		
7. WK-TITLE				
8. ORG-STR-CD	00 00 0000	00 00 00 00		
9. VAC-REV-CD		10. TARGET-GD	00	
11. LANG-REQ		12. PROJ-DTY-IND		
13. DUTY-STATION		14. BUS-CD/COPR-ST		
15. DT-LST-AUDIT	00 00 00	16. PAS-IND/LEO-IND		
17. DATE-EST	00 00 00	18. GD-BASIS-IND		
19. DT-REQ-REC	00 00 00	20. NTE-DT	00 00 00	
21. POS-ST-BUD		22. MT-REV/CL-ACT-CD		
23. DT-EMP-ASGN	00 00 00	24. DT-ABOL	00 00 00	
25. INACT/ACT		26. DT-INACT/REACT	00 00 00	
27. ACCTG-STAT		28. INT-ASGN-SER		
29. AGCY-USE		30. OBLIG-SSN		
31. DT-VACATED	00 00 00	32. INCUMBENT-SSN		
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **				

Figure 23: Query Individual Position Screen

Complete the applicable key fields (1 through 6) using the instructions under *Add Master Record (AM)* (on page 16) or *Add Individual Position (AI)* (on page 22). Press **Enter**. The selected Master Record or Individual Position is displayed as it exists on the PMSO database with the message *Master Record Found - Last Update XX/XX/XX by XXXXX* or *Individual Position Found - Last Update XX/XX/XX by XXXXX*. The message indicates the date of the last update to the Master Record or Individual Position and the user ID of the person responsible for the update.

If the Master Record or Individual Position selected is not on the PMSO database, the message *Master Record Not Found - Check Key Fields* or *Individual Position Not Found - Check Key Fields* is displayed. The cursor returns to the Department Code field, and you can select another Master Record or Individual Position and press **Enter**.

- To query another Master Record or Individual Position, change the applicable key fields and press **Enter**.
- To display the Query Individual Position screen at the Query Master Record screen, press **PF8**.
- To scroll forward through the Individual Position screen, press **PF8**.
- To perform another function or exit the system, press the applicable function key listed on the screen.



Help Master Record (HM) or Help Individual Position (HI)

Help Master Record is option **HM**, and Help Individual Position is option **HI** on the Position Management System Online screen. This option is used to access the help screens for a Master Record or Individual Position without using the **Add, Change, Delete, Inactivate, Reactivate**, or **Query** option. To select this option type **HM** or **HI**. Press **Enter**. The Help Master Record or Help Individual Position screen is displayed.

```

PM00201M                                HELP MASTER RECORD                                03/14/12
                                           (PF1=MENU)
1. FUNCTION 1    2. DEPT-CD/AGCY-BUR-CD    (PF5=HELP)
3. SON          4. MR-NO                    5. GRADE 00    (PF8=INDV)
***** (CLR=EXIT) *****

1. PAY-PLAN                                2. OCC-SER                                0000
3. OCC-FUNC-CD                             4. OFF-TLE-PF/CD/SF
5. OFF-TITLE
6. HQ-FLD-CD                                7. SUP-CD
8. CLASS-STD-CD                             9. INTERDIS-CD
10. DT-CLASS                                00 00 00    11. EARLY-RET-CD                            0
12. INACT/ACT                               13. DT-ABOL                                00 00 00
14. DT-INACT/REACT                          00 00 00    15. AGCY-USE
16. INTERDIS-SER                            0000      0000      0000      0000      0000
                                           0000      0000      0000      0000      0000

17. INTERDIS-PF/CD/SF

18. PATCO-CD                                19. PROF-CATEGORY

** POSITION CURSOR AT DESIRED FIELD AND PRESS -PF5- FOR HELP **
    
```

Figure 24: Help Master Record Screen



```

PM00301M                HELP  INDIVIDUAL  POSITION                03/14/12
                                (PF1=MENU)
1. FUNCTION H      2. DEPT-CD/AGCY-BUR-CD                (PF5=HELP)
3. SON            4. MR-NO            5. GRADE 00  6. IP-NO                (PF7=MSTR)
*****
1. FLSA-CD/PAY-TBL                2. FIN-DS/PROC-INTG  @                (PF8=NEXT)
3. POS-SCHED                      4. POS-SENS/DRUG-TS
5. COMP-LEV                        6. WK-TITLE-CD
7. WK-TITLE
8. ORG-STR-CD          00  00  0000  00  00  00  00
9. VAC-REV-CD
11. LANG-REQ
13. DUTY-STATION
15. DT-LST-AUDIT      00  00  00
17. DATE-EST         00  00  00
19. DT-REQ-REC       00  00  00
21. POS-ST-BUD
23. DT-EMP-ASGN      00  00  00
25. INACT/ACT
27. ACCTG-STAT
29. AGCY-USE
31. DT-VACATED       00  00  00
2. FIN-DS/PROC-INTG  @
4. POS-SENS/DRUG-TS
6. WK-TITLE-CD
10. TARGET-GD          00
12. PROJ-DTY-IND
14. BUS-CD/COPR-ST
16. PAS-IND/LEO-IND
18. GD-BASIS-IND
20. NTE-DT              00  00  00
22. MT-REV/CL-ACT-CD
24. DT-ABOL              00  00  00
26. DT-INACT/REACT     00  00  00
28. INT-ASGN-SER
30. OBLIG-SSN
32. INCUMBENT-SSN

**  POSITION CURSOR AT DESIRED FIELD AND PRESS -PF5- FOR HELP  **

```

Figure 25: Help Individual Position Screen

Move the cursor to the field in question and press **PF5**. The appropriate Help screen is displayed.

After viewing the Help screen, press **Enter** to return to the Help Master Record or Help Individual Position screen.

To request the Help screen for another field, move the cursor to the field and repeat the above instructions.

To request the Help screen for an Individual Position at the Help Master Record screen, press **PF8**.

To request the Help screen for a Master Record at the Individual Position screen, press **PF7**.

To perform another function or exit the system, press the applicable function key listed on the screen.



Position Inquiry (PI)

Position Inquiry is option **PI** on the Position Management System Online screen. This option is used to display all Individual Positions established for a Master Record. To select this option, type **PI**. Press **Enter**. The Position Inquiry screen is displayed.

PM00501M	POSITION INQUIRY	03/14/12
		(PF1=MENU)
1. FUNCTION <u>P</u>	2. DEPT-CD/AGCY-BUR-CD	(PF5=HELP)
3. SON	4. MR-NO	5. GRADE <u>00</u>
*****		(PF7=PREV)
OFF-TITLE		(PF8=NEXT)
OCC-SER <u>0000</u>	INTERDISC-CD	(CLR=EXIT)
IP-NUMBER	STATUS	SSN
		ORG-STRUCTURE-CD
		PAGE: <u>0001</u>
** PLEASE FURNISH KEY DATA AND PRESS -ENTER- **		

Figure 26: Position Inquiry Screen

Complete the key fields (1 through 5) using the instructions under **Add Master Record (AM)** (on page 16). Press **Enter**. The Individual Position(s) for the Master Record and grades are displayed. Fields 2, 5, and 9 are system generated from the Master Record. The Individual Position numbers, status, SSN, and organizational structure of each position linked to the Master Record are displayed.

If the position selected is not on the PMSO database, the message *Position Not Found - Check Key Fields* is displayed. The cursor returns to the Department Code field, and you can select another position.

- To inquiry about another Master Record, change the key fields and press **Enter**.
- To scroll backward through the Individual Positions, press **PF7**.
- To scroll forward through the Individual Positions, press **PF8**.
- To perform another function or exit the system, press the applicable function key listed on the screen.



Report Selection (SR)

Report Selection is option **SR** on the Position Management System Online screen. This option is used to specify the output criteria for a selected report. To select this option, type **SR**. Press **Enter**. The Report Selection screen is displayed.

```
*** POSITION MANAGEMENT SYSTEM ONLINE ***
      REPORT SELECTION

----> POSITION ORGANIZATION LISTING (AGENCY-SON-STRUCT).
----> POSITION ORGANIZATION LISTING (SON-STRUCT).
----> POSITION ORGANIZATION LISTING (STRUCTURE).
----> POSITION ORGANIZATION LISTING (AGENCY-SON-STRUCT,W/O SSN).
----> POSITION ORGANIZATION LISTING (SON-STRUCT,W/O SSN).
----> POSITION ORGANIZATION LISTING (STRUCTURE,W/O SSN).
----> SUPERVISORY RATIO BY AGENCY.
----> SUPERVISORY RATIO BY 4TH LEVEL ORG STRUCTURE.
----> COMPETITIVE LEVELS.
----> AVERAGE GRADE BY AGENCY.
----> AVERAGE GRADE BY 4TH LEVEL ORG STRUCTURE.
----> NEW STANDARDS IMPLEMENTATION.
----> POSITION WORKSHEET.
----> MAINTENANCE REVIEW WORKSHEET.
----> TRANSACTION LISTING.
----> POSITION ORGANIZATION LISTING (OCFO USE ONLY).

----> RETURN TO PREVIOUS MENU.

** POSITION CURSOR AND PRESS -ENTER- TO SELECT **
```

Figure 27: Report Selection Screen



Position the cursor next to the report you request for printing and press **Enter**. The Selection Criteria for Report screen is displayed.

```

PM00402M                SELECTION CRITERIA FOR REPORT                03/15/12

USER IDENTIFICATION      █
PRINTER                  (PF1=MENU)
JOB NAME CHARACTER      (PF5=HELP)
SYSTEM OUTPUT CLASS     (CLR=EXIT)
*****

DEPARTMENT CODE

SERVICING AGENCY

SUBMITTING OFFICE NUMBER

AGENCY CODE

ORGANIZATIONAL LEVEL 2

ORGANIZATIONAL LEVEL 3

ORGANIZATIONAL LEVEL 4

** PLEASE FURNISH REPORT CRITERIA AND PRESS -ENTER- TO SUBMIT **
    
```

Figure 28: Selection Criteria for Report Screen

Respond to the fields as follows:

Field	Description/Instruction
User Identification	Type the user's name or other information to identify the report destination.
Printer	Type the printer number where the report is to be printed.
Job Name Character	<p>Type A, B, or C to identify this report from other reports being requested. This character becomes the sixth character of the job name (i.e., NFC03A). If no entry is made, the system defaults to C.</p> <hr/> <p>Note: It is recommended that a unique six-digit job name character be entered whenever the possibility exists that more than one report is requested. If a character is not entered the system defaults to C. When two reports are requested, both jobs would have the same job name. Since duplicate jobs cannot execute at the same time, one job would have to be completed before the system could start executing the other job. If the reports were given the job name characters A and B, they could be executing simultaneously.</p>



Field	Description/Instruction
System Output Class	Type A to direct the output to a designated printer and to generate a hard copy computer printout of the report or X to direct the output to be held for viewing at the terminal. For detailed instructions on viewing a report prior to printing, see the Interactive System Productivity Facility (ISPF) procedure manual located under the Reporting publication category on the Publications page of the NFC Web site. If no entry is made, the system defaults to A .
Department Code	Type the Department code.
Servicing Agency	Type the code of the Agency that services your office.
Submitting Office Number	Type the SON (POI).
Agency Code	Type the Agency code.
Organizational Level 2	Type the second level of the organizational structure.
Organizational Level 3	Type the third level of the organizational structure.
Organizational Level 4	Type the fourth level of the organizational structure.

After completing the applicable fields, press **Enter**. The specified report is submitted for output.

- To request another report, press **PF1**. The PMSO Report Selection screen is displayed. Tab to the selection report title and press **Enter**. The Selection Criteria for Report screen is displayed, showing the data that was typed for the last request. Change the job name character and other applicable fields and press **Enter**.
- To exit the system, press **Clear**.
- To return to the PMSO menu, press **PF1** twice.

For more information see:

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Position Organization Listing (Agency-SON-Struct)

Report Number: PMSO0001

Brief Description: Provides the status of all positions within the POI and organizational structure of the Agency. This report is sorted by pay plan and descending grade. Inactive positions do not appear on the report.

Report Availability: After PINE is executed.

REPORT ID: PMSO0001										POSITION ORGANIZATION LISTING (AGENCY-SON-STRUCTURE)										PAGE 2	
										** SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED **											
DEPARTMENT AG		AGENCY 90		OFFICE OF FINANCE & MGT.																XX/XX/XX	
SVC AGENCY 90		ORG LEV 2 70		NATIONAL FINANCE CENTER																	
SON 5317		ORG LEV 3 01		OFFICE OF THE DIRECTOR																	
		ORG LEV 4 0000																			
NAME	SSN	DET	OR	MR-NO	IP-NO	P/P	OCC	SR	GR/ST	SUPV	W/S	T/A	SENS	FLSA	OFFICIAL TITLE	WORKING TITLE					
DOE	JAMES	D	XXXXX	XXXXXXXXX	GM	0343	15/00	5	F	CA	3N	E	PROG ANAL	ASST TO DIR							
XXX-XX-XXXX		0000				00	00-00-00-00		0	22-1690-071											
DOE	JOHN	G	XXXXX	XXXXXXXXX	GM	0340	15/00	2	F	CA	3N	E	PROG MGR	MAPS LIAISON							
XXX-XX-XXXX		0000				00	00-00-00-00		0	22-1690-071											
DOE	JOHN	C	XXXXX	XXXXXXXXX	GM	0343	14/00	5	F	CA	2N	E	PROG ANAL	MAPS LIAISON							
XXX-XX-XXXX		0000				00	00-00-00-00		0	22-1670-070											

Figure 29: Position Organization Listing (Agency-SON-Structure)

Position Organization Listing (SON-Struct)

Report Number: PMSO0002

Brief Description: Provides the status of all positions within the POI and organizational structure of the Agency. This report is sorted by pay plan and descending grade. Inactive positions do not appear on the report.



Report Availability: After PINE is executed.

REPORT ID: PMSO0002	POSITION ORGANIZATION LISTING (SON-STRUC)													PAGE 1	
** SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED **															
DEPARTMENT AG	AGENCY	90	OFFICE OF FINANCE & MGT.											XX/XX/XX	
	ORG LEV	2	00												
SON	5317	ORG LEV	3	00											
	ORG LEV	4	0000												
NAME	MR-NO	IP-NO	P/P	OCC	SR	GR/ST	SUPV	W/S	T/A	PV	W/S	T/A	SENS	FLSA	OFFICIAL TITLE
SSN	* DET	OR	TEMP	KEY	DATA	* ORG	STR	5-8	PRD	DUTY	PRD	DUTY	STATION	WORKING	TITLE
DOE XXX-XX-XXXX	JANE		0000	XXXXXX	XXXXXXXX	0212	12/03	0			22-1		22-1690-071		EO EMPLMT MGR
DOE XXX-XX-XXXX	JOHN		0000	XXXXXX	XXXXXXXX	0212	11/02	0			22-1		22-1690-071		EO EMPLMT SPECLST

Figure 30: Position Organization Listing (SON-Struc)

Position Organization Listing (Structure)

Report Number: PMSO0003

Brief Description: Provides the status of all positions within the POI and organizational structure of the Agency. This report is sorted by pay plan and descending grade. Inactive positions do not appear on the report.

Report Availability: After PINE is executed.

REPORT ID: PMSO0003	POSITION ORGANIZATION LISTING (STRUCTURE)													PAGE 1	
** SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED **															
DEPARTMENT AG	AGENCY	90	OFFICE OF FINANCE & MGT.											XX/XX/XX	
	ORG LEV	2	00												
SON	5317	ORG LEV	3	00											
	ORG LEV	4	0000												
NAME	MR-NO	IP-NO	P/P	OCC	SR	GR/ST	SUPV	W/S	T/A	PV	W/S	T/A	SENS	FLSA	OFFICIAL TITLE
SSN	* DET	OR	TEMP	KEY	DATA	* ORG	STR	5-8	PRD	DUTY	PRD	DUTY	STATION	WORKING	TITLE
DOE XXX-XX-XXXX	JANE		0000	XXXXXX	XXXXXXXX	0212	12/03	0			22-1		22-1690-071		EO EMPLMT MGR
DOE XXX-XX-XXXX	JOHN		0000	XXXXXX	XXXXXXXX	0212	11/02	0			22-1		22-1690-071		EO EMPLMT SPECLST

Figure 31: Position Organization Listing (Structure)



Position Organization Listing (Agency-SON-Struct w/o SSNs)

Report Number: PMSO0001

Brief Description: Provides the status of all positions without the SSNs within the POI and organizational structure of the Agency and is sorted by pay plan and descending grade. Inactive positions do not appear on the report. This report does not include SSNs.

Report Availability: After PINE is executed.

REPORT ID: PMSO0001														POSITION ORGANIZATION LISTING (AGENCY-SON-STRUCTURE)														PAGE 2															
DEPARTMENT AG														AGENCY 90														OFFICE OF FINANCE & MGT.														XX/XX/XX	
SVC AGENCY 90														ORG LEV 2 70														NATIONAL FINANCE CENTER															
SON 5317														ORG LEV 3 01														OFFICE OF THE DIRECTOR															
														ORG LEV 4 0000																													
NAME	SSN	*	DET	OR	MR-NO	IP-NO	P/P	OCC	SR	GR/ST	SUPV	W/S	T/A	SENS	FLSA	OFFICIAL TITLE	WORKING TITLE																										
DOE	JAMES	D	0000	XXXXXX	XXXXXXXX	GM	0343	15/00	5	F	CA	3N	E	0	22-1690-071	ASST TO DIR	PROG ANAL																										
DOE	JOHN	G	0000	XXXXXX	XXXXXXXX	GM	0340	15/00	2	F	CA	3N	E	0	22-1690-071	MAPS LIAISON	PROG MGR																										
DOE	JOHN	C	0000	XXXXXX	XXXXXXXX	GM	0343	14/00	5	F	CA	2N	E	0	22-1670-070	MAPS LIAISON	PROG ANAL																										

Figure 32: Position Organization Listing (Agency-SON-Structure)

Position Organization Listing (SON-Struct)

Report Number: PMSO0002

Brief Description: Provides the status of all positions without SSNs within the POI and organizational structure of the Agency and is sorted by pay plan and descending grade. Inactive positions do not appear on the report. report does not include SSNs.



Report Availability: After PINE is executed.

REPORT ID: PMSO0002		POSITION ORGANIZATION LISTING (SON-STRUC)										PAGE	1		
** SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED **															
DEPARTMENT AG	AGENCY	90	OFFICE OF FINANCE & MGT.										XX/XX/XX		
			ORG LEV 2 00												
SON	5317		ORG LEV 3 00												
			ORG LEV 4 0000												
NAME	MR-NO	IP-NO	P/P	OCC	SR	GR/ST	SUPV	W/S	T/A	PV	W/S	T/A	SENS	FLSA	OFFICIAL TITLE
SSN	* DET OR	TEMP	KEY DATA	* ORG	STR	5-8		PRD	DUTY	PRD	DUTY	STATION	WORKING TITLE		
DOE XXX-XX-XXXX	JANE	0000	XXXXXX	XXXXXXX	0212	12/03	0	22-1		22-1690-071			EO	EMPLMT	MGR
DOE XXX-XX-XXXX	JOHN	0000	XXXXXX	XXXXXXX	0212	11/02	0	22-1		22-1690-071			EO	EMPLMT	SPECLST

Figure 33: Position Organization Listing (SON-Struc)

Position Organization Listing (Structure)

Report Number: PMSO0003

Brief Description: Provides the status of all positions without SSNs within the organizational structure and is sorted by pay plan and descending grade. Inactive positions do not appear on the report.

Report Availability: After PINE is executed.

REPORT ID: PMSO0003		POSITION ORGANIZATION LISTING (STRUCTURE)										PAGE	1		
** SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED **															
DEPARTMENT AG	AGENCY	90	OFFICE OF FINANCE & MGT.										XX/XX/XX		
			ORG LEV 2 00												
SON	5317		ORG LEV 3 00												
			ORG LEV 4 0000												
NAME	MR-NO	IP-NO	P/P	OCC	SR	GR/ST	SUPV	W/S	T/A	PV	W/S	T/A	SENS	FLSA	OFFICIAL TITLE
SSN	* DET OR	TEMP	KEY DATA	* ORG	STR	5-8		PRD	DUTY	PRD	DUTY	STATION	WORKING TITLE		
DOE XXX-XX-XXXX	JANE	0000	XXXXXX	XXXXXXX	0212	12/03	0	22-1		22-1690-071			EO	EMPLMT	MGR
DOE XXX-XX-XXXX	JOHN	0000	XXXXXX	XXXXXXX	0212	11/02	0	22-1		22-1690-071			EO	EMPLMT	SPECLST

Figure 34: Position Organization Listing (Structure)



Report Availability: After PINE is executed.

REPORT ID			SUPERVISORY RATIO BY 4TH LEVEL ORG STRUCTURE			PAGE 1		
PMSO0005						XX/XX/XX		
SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED								
AGENCY			90 - OFFICE OF FINANCE & MGT.					
LEVEL 2			70 - NATIONAL FINANCE CENTER					
LEVEL 3			30 - FINANCIAL SERVICES DIVISION					
LEVEL 4	EMPLOYEES	SUPERVISORS	RATIO					
0000 -	8	3	1: 2.7					
0010 - ACCOUNTING OPERATIONS BRANCH	37	4	1: 9.3					
0020 - ACCOUNTING RECONCILIATION BR	29	3	1: 9.7					
0030 - ACCOUNTING REPORTING BRANCH	52	5	1: 10.4					
0040 - PAYROLL/PERSONNEL BRANCH	202	13	1: 15.5					

Figure 36: Supervisory Ratio by 4th Level Org Structure

Competitive Levels

Report Number: PMSO0006

Brief Description: Provides the total number of positions for a specific position official title reflecting competitive levels as they relate to pay plan, grade, and occupational series code within an Agency. The report is sorted by competitive level.

Report Availability: Immediately, as data is entered in PMSO.

REPORT ID			COMPETITIVE LEVELS			PAGE 8		
PMSO0006						XX/XX/XX		
** SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED **								
AGCY-CODE :			90					
SON-CODE :			5317					
COMP LEV	PAY-PLAN	GRADE	OCC-SER-CD	OFF-TITLE-CD	POSITON-OFFICIAL-TITLE	NUMBER OF POSITIONS		
0003	GM	15	0340	0030	PROG MGR	1		
0003	GS	06	0318	0001 C	SECY OA	1		
0003	GS	04	0303	0201	PYMT DOCMT CONT CLK	16		
0003	GS	04	0503	0017	DOCMT PROCSNG CLK	24		
0003	GS	03	0303	0201	PYMT DOCMT CONT CLK	1		

Figure 37: Competitive Levels



Average Grade by Agency

Report Number: PMSO0007

Brief Description: Provides a list of the number of General Schedule (GS) employees by type of appointment and work schedule within the Agency and is sorted by grade.

Report Availability: After PINE is executed.

REPORT ID: PMSO0007									
AVERAGE GRADE BY AGENCY									
** SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED **									
DEPARTMENT: AG									
AGENCY: 90 - OFFICE OF FINANCE & MGT.									
PAGE 1									
XX/XX/XX									
GS&SIMILAR	PERM	TEMP	PERM	TEMP	PERM	TEMP	PERM	TEMP	TOTAL
GRADE	FULL	FULL	FULL	PART	PART	PART	INT.	INT.	
	TIME	TIME	TIME	TIME	TIME	TIME			
02	2		2			21			25
03		21	1	22	2	32		2	58

Figure 38: Average Grade by Agency

Average Grade by Fourth Level Organizational Structure

Report Number: PMSO0008

Brief Description: Provides a list of the number of GS employees by type of appointment and work schedule within an organizational structure to the fourth level of the Agency and is sorted by grade.



Report Availability: After PINE is executed.

GS&SIMILAR		PERM	TEMP	FULL	PERM	TEMP	PERM	TEMP	TOTAL
GRADE	TIME	TIME	TIME	TIME	TIME	TIME	INT.	INT.	
07	1			1					1
15	1			1					
LEV4 TOTAL	2			2					
AVER.GRADE	11.0000	00.0000		11.0000	00.0000	00.0000			

Figure 39: Average Grade by 4th Level Org Structure

New Standards Implementation

Report Number: PMSO0009

Brief Description: Provides the total number of implemented and non-implemented position standards for each occupational series code within an Agency and is sorted by occupational series code.



Report Availability: Immediately, as data is entered in PMSO.

REPORT ID PMSO0009				NEW STANDARDS IMPLEMENTATION		PAGE 3	
** SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED **							
AGENCY: 90							
SON : 5317							
	<u>SERIES</u>	<u>TOTAL POSITIONS</u>	<u>NUMBER IMPLEMENTED</u>	<u>NUMBER NOT IMPLEMENTED</u>			
	0510	157	95	62			
	0511	14	9	5			
	0525	401	96	305			
	0540	10	0	10			
	0544	158	133	25			

Figure 40: New Standards Implementation

Position Worksheet

Report Number: PMSO000A

Brief Description: Provides the SSN of the person occupying a specific position. The report provides the pay plan and grade, Master Record number, Individual Position number, occupational series code, and competitive level of the position by organizational structure to the eighth level.



Report Availability: After PINE is executed.

PP/GR	MASTER NUMBER	IND POS NUMBER	OCCU SERIES	COMP LVL	SSNO	DATE VACATED	ORG-STR
GS/12	XXXXXXXX	XXXXXX	0260	34	XXX-XX-XXXX	1- 3 95	70-02-0000-00-00-00-00
GS/11	XXXXXXXX	XXXXXX	0260	44	XXX-XX-XXXX		70-02-0000-00-00-00-00
GS/07	XXXXXXXX	XXXXXX	1001	64	XXX-XX-XXXX		70-02-0000-00-00-00-00
GS/06	XXXXXXXX	XXXXXX	0361	0047	XXX-XX-XXXX		70-02-0000-00-00-00-00
TOTAL				4			

Figure 41: Position Worksheet

Maintenance Review Worksheet

Report Number: PMSO000B

Brief Description: Provides a list of employees and the status of their positions and is signed-in approval by the supervisor. The report is sorted by descending pay plan and grade. The report is used by management/personnel to conduct the annual position description review and to target position descriptions for maintenance review. The report is initialized by the employee and classifier.



Report Availability: Immediately, as data is entered in PMSO.

REPORT ID: PMSO000B		MAINTENANCE REVIEW WORK SHEET				DATE: XX/XX/XX		PAGE 2	
DEPT/AGCY: AG 90		SON: 5317		I HAVE REVIEWED THE POSITION DESCRIPTIONS FOR THE EMPLOYEES BELOW. ALL EMPLOYEES					
ORG-STR 2-8: 70 02 0000 00 00 00 00		HAVE DISCUSSED THE STATUS OF THEIR POSITION DESCRIPTIONS WITH ME AND WE AGREE TO							
THE STATUS CODE CITED BELOW IN COLUMN 7, UNLESS OTHERWISE INDICATED.									
SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED				SUPERVISOR SIGNATURE/TITLE/DATE			OTHER APPROVALS/TITLE/DATE		
1	2	3	4	5	6	7	8	9	10
EMPLOYEE NAME	MASTER/IND	PAY-PLAN/	DATE LAST	PROJ	GBI	PD	EMPLOYEE	FINAL	
CLASSIFIER									
OFFICIAL TITLE	POSITION #	SERIES/GRADE	AUDITED	DUTY		STATUS	INITIALS	ACTION CODE	
INITIALS									
DOE 0002 /PROG ANALYST	J XXXXXX	XXXXXXXX GS 0343 11	09-25-86	N					
DOE 9999 /PROG ANALYST	S A XXXXXX	XXXXXXXX GS 0343 07	05-26-89	N					
DOE 9998 /FILE CLERK	T R XXXXXX	XXXXXXXX GS 0222 06	01-02-92	N					
TOTAL EMPLOYEES	3	PD STATUS CODES (COL. 7) A=NO CHANGE B=MINOR CHANGE C=NEW PD D=ABOLISH							

Figure 42: Maintenance Review Work Sheet

Transaction Listing

Report Number: PMSO000C

Brief Description: Provides a list of PMSO transactions for each record type processed. If applicable, the report will also indicate that a suspense message has been generated for the PMSO item changed. The report is sorted by Master Record and Individual Position number.



Report Availability: After PINE is executed.

REPORT ID: PMS000C											POSITION MANAGEMENT SYSTEM											PAGE 1																																											
DEPT AG											SVC AGCY 90											** SENSITIVE PERSONNEL DATA -- USE IS RESTRICTED **											XX/XX/XX																																
SON 5317											AGCY 90											TRANSACTION LISTING																																											
**											K E Y D A T A											**											RECORD											DATE/TIME											USER										
DEPT	AGCY	SON	MR-NO	GR	IP-NO	SSNO	FUNCTION	SINQ	MSG	TYPE	ENTERED	ID																																																					
AG	90	5317	XXXXXX	04	XXXXXXXX	XXX-XX-XXXX	ADD			MASTER	950301	14:12	NP016																																																				
AG	90	5317	XXXXXX	15	XXXXXXXX	XXX-XX-XXXX	CHANGE			IND	950303	09:48	NP016																																																				
AG	90	5317	XXXXXX	15	XXXXXXXX	XXX-XX-XXXX	CHANGE			IND	950302	14:51	NP016																																																				
AG	90	5317	XXXXXX	05	XXXXXXXX	XXX-XX-XXXX	INACT			IND	950302	12:31	NP010																																																				
AG	90	5317	XXXXXX	06	XXXXXXXX	XXX-XX-XXXX	ADD			IND	950303	08:55	NP010																																																				
AG	90	5317	XXXXXX	05	XXXXXXXX	XXX-XX-XXXX	CHANGE			IND	950301	13:54	NP004																																																				

Figure 43: Transaction Listing



Edit Messages

All position data entered in PMSO is subject to front-end system edits. If an error occurs or if required data is omitted, an edit message is displayed at the bottom of the screen. All errors must be corrected before the PMSO database is updated.

Abolish Error - Please Try Again

Acctg Station Not Found In Table

Add Error - Please Try Again

Agcy-Bur-Cd And SON Are Not Compatible

Agency Code Required

Change Error - Please Try Again

Comp-Lev (Block 5) Not Compatible With FLSA-Cd (Block 1)

Connect Error - Please Try Again

Database Connect Error - Please Try Again

Database Currently Unavailable - Try Again Later

Date Has Invalid Day For Month Entered

Date Has Invalid Month

Date Has Invalid Year

Department Code Invalid

Department Code Required

Drug-Ts (Block 4) Invalid

Dt-Abol (Block 24) Prior To Date-Est (Block 17)

Dt-Abol Has Invalid Day For Month Entered

Dt-Abol Has Invalid Month

Dt-Abol Has Invalid Year

Dt-Abol Prior To Dt-Class (Block 10)



Dt-Class (Block 10) Required

Dt-Class Required

Dt-Inact/React Has Invalid Day For Month Entered

Dt-Inact/React Has Invalid Month

Dt-Inact/React Has Invalid Year

Dt-Inact/React Prior To Dt-Class (Block 10)

Duty Station Not Found In Table

Enter Date To Delete/Enter Zeros To Restore Master Record

Enter Date To Delete/Enter Zeros To Restore Individual Position

Enter Date And Press - Enter - To Inactivate

Enter Date And Press - Enter - To Reactivate

Error Occurred During Add - Please Try Again

Error Occurred During Delete - Please Try Again

Error Occurred During Mod - Please Try Again

Error Occurred During Modify - Please Try Again

Function Not Active For Current Screen

Grade (Block 5) Required

Inactivate Error - Please Try Again

Individual Position Already Abolished - Action Rejected

Individual Position Abolished - Action Rejected

Individual Position Active Within Master - Action Rejected

Individual Position Already Abolished - Action Rejected

Individual Position Already Active - Action Rejected

Individual Position Already Inactive - Action Rejected

Individual Position Filled - Action Rejected



Individual Position Found

Individual Position Not Found - Check Key Fields

Individual Position Obligated - Action Rejected

Individual Position Successfully Added

Individual Position Successfully Changed

Individual Position Successfully Changed - Personnel Action Required

Individual Position Successfully Deleted

Individual Position Successfully Inactivated

Individual Position Successfully Modified

Individual Position Successfully Modified - Personnel Action Required

Individual Position Successfully Reactivated

Individual Position Successfully Restored

Individual Positions Exhausted

Individual Position Obligated - Action Rejected

Individual Record Not Found - Check Key Fields

Int-Asgn-Ser (Block 28) Invalid For This Position

Int-Asgn-Ser (Block 28) Required For This Position

Interdis-Cd Must Be "Y" If Interdis-Ser & Interdis-Title-Cd Entered

Interdis-Ser & Interdis-Title-Cd Must Have At Least One Entry

Invalid Cursor Position

Invalid Class-Std-Cd (Block 8)

Invalid Cursor Position

Invalid Early-Ret-Cd (Block 11)

Invalid Hq-Fld-Cd (Block 6)

Invalid Inact/Act (Block 12)



Invalid Inact/Act (Block 25)

Invalid Interdis-Cd (Block 9)

Invalid Interdisc Title Code

Invalid Interdisc Title Prefix

Invalid Interdisc Title Suffix

Invalid Occ-Func-Cd (Block 3)

Invalid Occ-Ser (Block 2)

Invalid Off-Title-Cd For Occ-Ser

Invalid Off-Title-Cd Prefix

Invalid Off-Title-Cd Suffix

Individual Positions Exhausted

Invalid Security Level Request

Invalid Subschema Request

Invalid Sup-Cd (Block 7)

IP-No (Block 6) Required

LEO-Ind (Block 16) Invalid

Make Changes And Press - Enter - To Update Individual

Make Changes And Press - Enter - To Update Master

Make Changes And Press - Enter - To Update Position

Make Desired Changes And Press - Enter - To Add Additional Positions

Master Record Abolished - Action Rejected

Master Record Already Active - Action Rejected

Master Record Exists - Check Key Fields

Master Record Already Inactive - Action Rejected

Master Record Coded Inactive - Action Rejected



Master Record Found

Master Record Not Found - Check Key Fields

Master Record Successfully Added

Master Record Successfully Deleted

Master Record Successfully Inactivated

Master Record Successfully Modified

Master Record Successfully Modified - Personnel Action Required

Master Record Successfully Reactivated

Master Record Successfully Restored

Modify Error - Please Try Again

MR-No (Block 4) Required

No Individual Positions For This Master

No Individual Positions Found For This Master

No Individual Positions Found For This Master Record

NTE-Dt (Block 20) Invalid For Permanent Position

NTE-Dt (Block 20) Prior To Date-Est (Block 17)

NTE-Dt (Block 20) Required For Non-Permanent Position

Occ-Func-Cd (Block 3) Required For This Occ-Ser

Occ-Ser (Block 2) Invalid For Pay Plan

Occ-Ser (Block 2) Obsolete

Occ-Ser (Block 2) Obsolete For Dt-Class (Block 10)

Off-Title Required For This Off-Title-Cd

Off-Title-Cd (Block 4) Required

Org Structure Not Found In Table

Org-Structure Obsolete - Action Rejected



Organizational Level 2 Required

Organizational Level 3 Required

Output Class Of "A" Or "X" Required

Pay-Plan And Grade Are Not Compatible

Pay-Plan And Grade Not Compatible

Pay-Plan Not Compatible With Agcy-Bur-Cd

Pay-Plan Not Compatible With Off-Title-Cd

Pay-Plan Not Compatible With Target-Gd (Block 10)

Pay-Table-Code (Block 1) Invalid

Pay-Table-Code Not Compatible With Grade Or Pay-Plan

Pay-Table-Code Not Compatible With LEO-Ind

Please Furnish Key Data And Press Enter

Please Furnish Report Criteria And Press - Enter - To Submit

Please Furnish Required Fields And Press Enter

Position Cursor And Press - Enter - To Select

Position Cursor At Desired Field And Press - PF5 - For Help

Printer ID Required

Proc-Intg (Block 2) Invalid

Professional Category Required

Reactivate Error - Please Try Again

Report Successfully Submitted

Request Denied - Security Violation

Selected Function Invalid - Please Try Again

Servicing Agency Invalid

Servicing Agency Not Found In Table



Servicing Agency Required

Submitting Office Number And Agency Code Not Compatible

Submitting Office Number Is Not Numeric

Submitting Office Required

Sup-Cd (Block 7) Required

Sup-Cd Required

Target-Gd (Block 10) Required

User Identification Required

User-ID Not Compatible With System-ID

Wk-Title-Cd (Block 6) Not Compatible With Dept-Cd



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