



Position Management Guide

The Positions formerly known as Position Management function serves as a central database where Trust Central – FISCAL module identifies positions and staff from your agency that are supporting your program(s). It is here where the information about positions, staff, and relation of a position to a program(s) is created and maintained.

Important: Before the process is operational, the agency and CSC workflow process must be set up for each fiscal document. To ensure confidentiality, this section can be only accessed for users that have access to Trust Central – Fiscal.

Positions are created for and exist at the Agency level. Each position will have an automatically assigned number called **Position ID**.

Each Position supports one or more Programs at a specified percentage, which is referred to as **Program %**. The relationship of the position to the program is defined as the **Program Assignment**, and it refers to the number of hours per week dedicated to the Program.

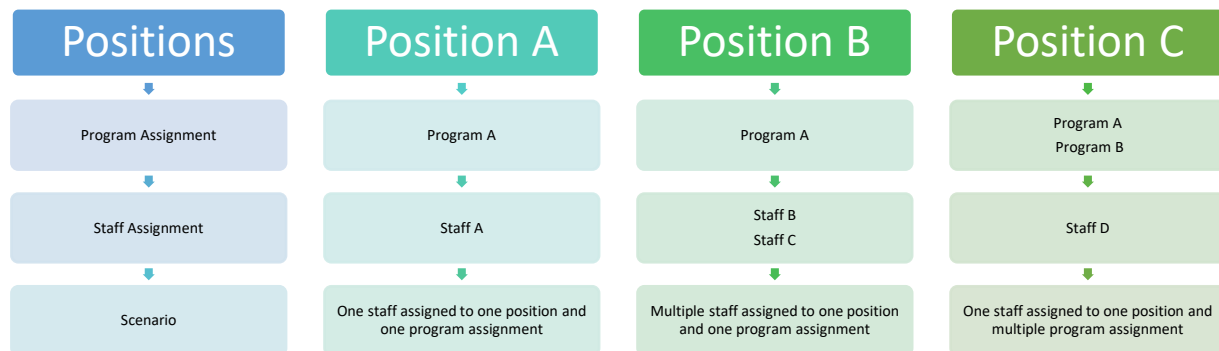
In FISCAL, Staff members can only be assigned to a position once the Program Assignment is established, and it can be recorded using the Add Assignment function. FISCAL automatically assigns a Staff ID number. The staff assignment will remain open until changes/terminations have occurred at the agency, and these updates must be recorded in FISCAL.

Positions can be used across multiple fiscal years. Therefore, **only** new positions or changes to existing records need to be made when negotiating new budgets.

Navigation in Positions (Position Management)

The Positions tab allows authorized users to create new or search for positions and/or staff linked to existing fiscal documents in FISCAL. The positions and staff assignments can be set-up under a Program Support and Staff Assignment must be established. ram Support and Staff Assignment must be established.

Below are three of the most common options while associating a Program and Staff(s) to a Position

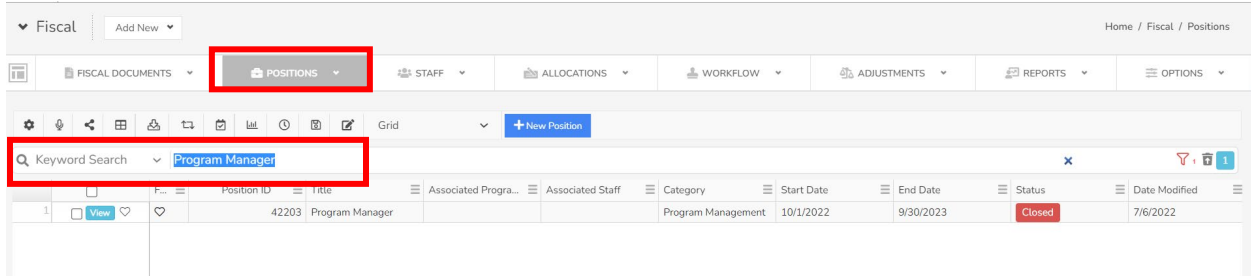


Pooled Position: is a **group of five or more identical positions** (pooled position). However, The Children’s Trust does not recommend the use of pooled position. Only in a special situation, may a pooled position be used, and it must be approved. Please contact your Contract Manager to ensure that pooled position is an option for your program.

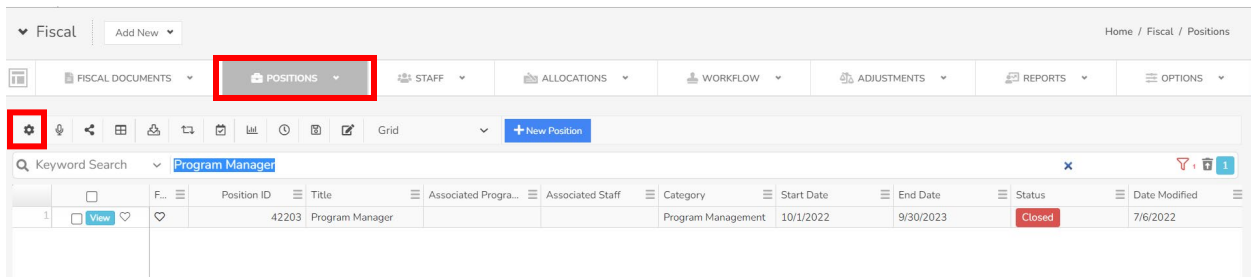
Shared Positions: is a position that **the effort is shared among different programs** (see position c example above). When creating this position, **make sure the total effort across different programs do not exceed 100%. Also, that the total hours included in the different budgets, do not exceed 40 hrs/wk.**

The positions are listed in a **grid**. The grids can be modified based on your preference and need.

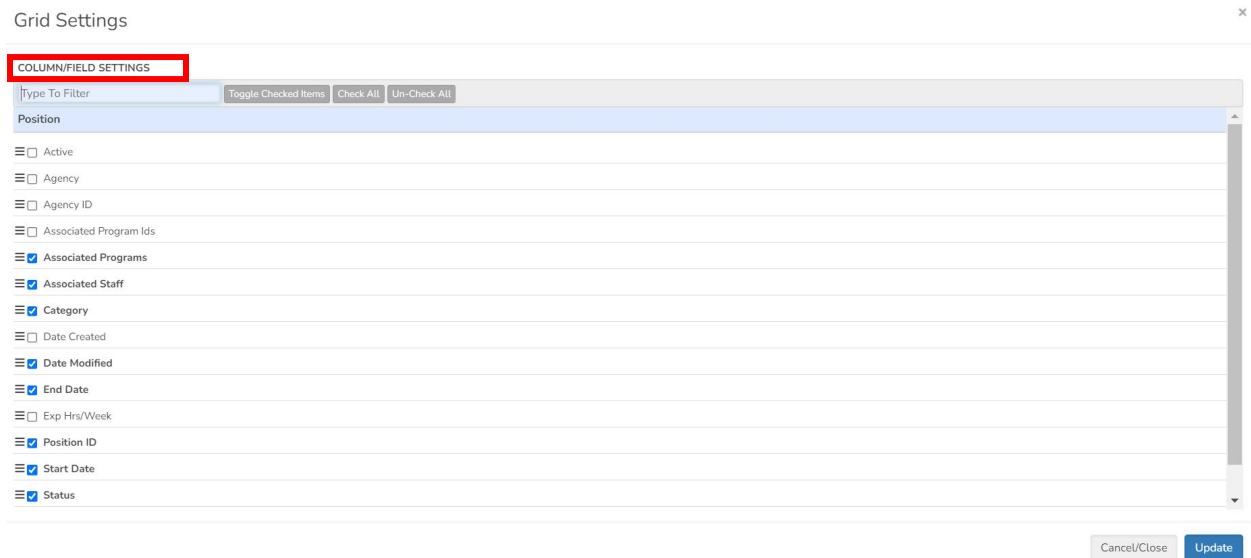
Search (Filters): Search items included but not limited to position ID, title, staff name, start and end date, hrs/week, status, etc. Below is a print screen for easy identification: position ID, title, staff name, start and end date, hrs/week, status, etc. for easy identification.



Settings: use the setting icon function located in the positions sub menu to customize the grid.

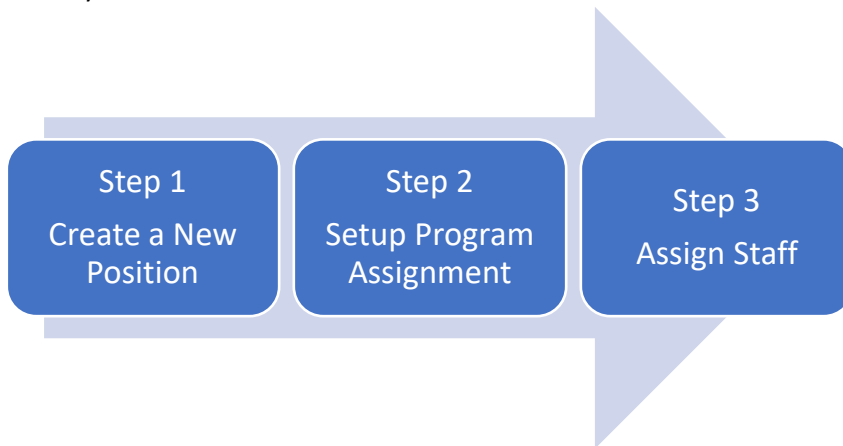


By selecting the option, the system will generate a separate window with all possible items it can be added to the grid. These items are listed under “columns” section. By default, the grids are set-up to show row numbers and table resize. When done, click “Update.”

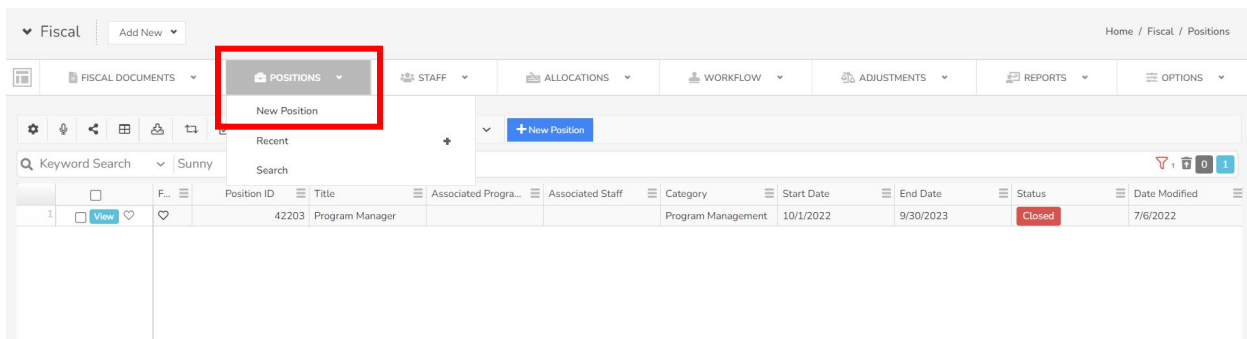


How to create a new position

There are three (3) main steps that must be completed in order to have Positions correctly setup in FISCAL. Before starting to create new positions in FISCAL, we recommend having a complete list of positions and the staff at your agency that will be supporting a single program or multiple contracts funded by The Children’s Trust.



Step 1 – Create a new Position: click on the “Positions” tab and then “New Position.” (Always verify that the position has not been created already)



- Choose the agency from the **Agency** dropdown list.
- Enter the title of the position in the **Title** field. This title must agree with the title at the agency/payroll.
- Select the category of the position from the **Category** dropdown list. Make sure the correct category is selected. **The category selected would generate the staff’s qualifications when the staffing plan is set-up in the Contracts module. Please refer to the Position Management Category List Breakdown listed at the end of this handout.**
- Enter the expected hours per week that this position works at the agency in the **Expected Hours/Wk field**.
- Enter the start date of the position in the **Start Date** field. This is the date the position was created/funded. The calendar icon can also be used to select the date.
- Leave **Position End Date** in blank. Position End Date is entered only when terminating the position.
- Select **SAVE** to save the changes without adding the program assignment. **OR**
- Select **Cancel** to cancel the changes and return the position’s grids.

New Position

Agency * Enter Agency Name

Title *

Category * Select One

Expected Hours / Wk *

Position Start Date *

Position End Date *

After Saving, Go To Add Position Program Assignment

Save Cancel

Step 2 – Setup Position Assignment by associating the Position to a single program or multiple programs; this relationship is called Position Assignment. The next step allows the user to associate the newly created position with one or more programs at the agency.

New Position Assignment

Program * Select Program

Assignment Start Date *

Assignment End Date *

Staff	Found In Budget	Start Date	End Date	Last Check Run Date	Termination
Select Staff					Select One

Add Staff Assignment

Save Assignment Cancel

- Select the program from the **Program** dropdown list.
- Select the start date from the calendar in the **Assignment Start Date** field.
- Leave the **Assignment End Date** field blank. Assignment End Date is entered only when position is no longer supporting the program.
- Select the **Save Assignment** link to save the data or select **Cancel** to cancel the changes and close the row.
- Multiple Position Assignments** - If the position supports multiple programs, it will be necessary to associate the position with the other program(s). Click on **“Add Position Assignment”** and repeat **Step 2 (a-c)**.

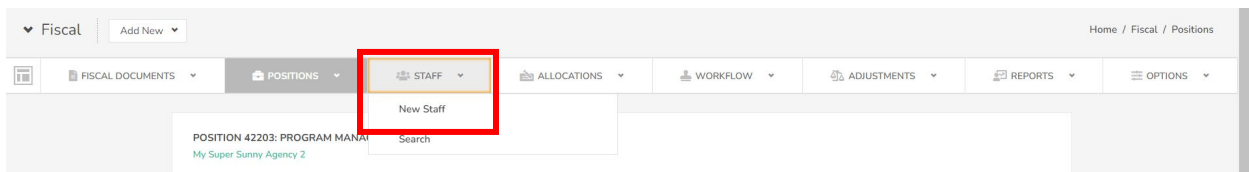
Step 3 – Assign a Staff Member to the Position Assignment record.

The final step of the process is to link a staff member to the program assignment which in turn associates them with the position. Usually, there is only one staff member attached to a specific position, but the Position tab can accommodate multiple staff sharing the same position if applicable.

- a. Select the name of the staff in the Staff box if there is an existing staff. If the staff is new to the agency, and it has not been created, see “b” below.

Note: If the position is vacant at the time it is being created, select “TBD, TBD” from the dropdown list to be used as a placeholder until the position is filled. If “TBD, TBD” is not listed in the dropdown list, it must be created, using “TBD” as the First and Last Name. It is not necessary to create a new “TBD” staff member for each vacant position. The same “TBD” position must be used across all programs. Once the position is filled, the “TBD” position must be terminated (refer to Terminating a Staff Assignment section below) and a new staff assignment must be created.

- b. **Create a new Staff:** click on the “Staff” tab and then “New Staff.” (Always verify that the staff has not been created already)



- c. Complete the fields that have an apteryx (*) next to it. Click Save.

A screenshot of a 'Staff Detail' form. The form contains several input fields and dropdown menus. Three fields are highlighted with red boxes: 'Agency *', 'First Name *', and 'Last Name *'. The 'Agency *' field is a dropdown menu with the placeholder text 'Enter Agency Name'. The 'First Name *' and 'Last Name *' fields are text input boxes. Other fields include 'Agency Employee ID', 'Middle Initial', 'Email', 'Race' (dropdown), 'Ethnicity' (dropdown), 'Gender' (radio buttons for Female and Male), 'Languages Spoken' (table with columns for Language Priority and Language), and 'Active *' (radio buttons for Yes and No). At the bottom of the form, there are 'Save' and 'Cancel' buttons.

How to record a termination

There are three levels of terminations in Position that may occur.

- The **staff** position at the agency or leaves the agency. (i.e., the staff gets a promotion or retires.)
- The **program assignment** records may occur as a result of either the Position terminating at the Agency or Program level.
- The **position** may be terminated. This occurs if the position is no longer in a CSC funded program. (i.e., the position has been eliminated.)

Terminating a Staff Assignment

1. Search the position by utilizing the grids search functionality. You could filter the grids by the “Position ID or Title” the staff is being linked to. Also, filtering the grids by “staff.”
2. Select the position the position assignment is connected to.
3. Once in the position, click on “Modify Assignment”.
4. Enter the termination date from the calendar in the “End Date” field.
5. Select the termination reason from the “Termination” dropdown.
6. Click on “Save” the changes. Or “Cancel” to return without saving.
7. After terminating a staff assignment, if applicable replace the terminated staff assignment with another one by selecting the “Add Staff Assignment”

Period	Category	Status	Hours/Week	Programs	Modified On	
LIN XX32-8765 MY SUPER SUNNY AGENCY 2						
					View Program	Modify Assignment
Assig. ID	# of Staff	Assignment Period	Modified On			
44965	1	10/01/22 - Open				
Staff Member	Staff Period	Status	Termination Reason			
John Doe	10/01/22 - Open	Active				

Terminating a Program Assignment

Program Assignment should be terminated if the program no longer supports this position. To terminate Program Assignment, the user should:

1. Search the position by utilizing the grids search functionality. You could filter the grids by the “Position ID or Title” the staff is being linked to. Also, filtering the grids by “staff.”
2. Select the position to program assignment is connected to.
3. Once in the position, click on “Modify Assignment”.
4. Go to the “Program Assignment” you wish to terminate and select the termination date from the calendar under the “Position End Date” field.
5. Click on “Save” the changes. Or “Cancel” to return without saving.

Position Assignment: 44965

Program LIN XX32-8765 My Super Sunny Agency 2

Assignment Start Date * 10/01/2022

Assignment End Date *

Staff	Found In Budget	Start Date	End Date	Last Check Run Date	Termination	
John Doe	No	10/01/2022	10/27/2022	10/27/2022	Program Support Terminated	Delete

Add Staff Assignment

Terminating a Position

Positions should be terminated when the CSC no longer funds the position in any CSC funded programs. To terminate the position the user should:

1. Search the staff by utilizing the grids search functionality. You could filter the grids by the "Position ID or Title" the staff is being linked to. Also, filtering the grids by "staff."
2. Select the position.
3. Once in the position, click on "Modify" located underneath the position's title.

POSITION 42203: PROGRAM MANAGER
My Super Sunny Agency 2

Modify Details Add Position Program Assignment

4. Select a date from the calendar in the "Position End Date" field.

Note: Make sure the "end date" selected, is at a minimum, the same end date entered in the program assignment as well as the staff termination. If the assignment end date is an earlier than the other two dates, the system would give an error message

Position: 42203

Agency * My Super Sunny Agency 2

Title * Program Manager

Category * Program Management

Expected Hours / Wk * 40

Position Start Date * 10/01/2022

Position End Date *

Position Category List Breakdown

As stated in “How to setup a new position” section, the category selected would generate the staff’s qualifications when the staffing plan is setup in the Contracts module. Below is a table with all the possible options you can select from. **Make sure to share this list with the staff in charge of completing the staffing plan.**

Position Category ID	Category Description	Qualifications - Minimum Expectations	Responsibilities
3	Administrative Support/Clerical/Data Entry	A high school diploma or General Equivalency Diploma (GED).	Performs office duties of a routine nature that may involve a variety of tasks and work methods.
4	ARNP	Current licensure by state boards of Professional Regulation and Education, with a current CPR/ First Aid Certification.	Provides direct nursing care, primary care services, and health prevention activities per assigned duties included in the position job description.
5	CEO/Executive Director	Bachelor Degree or equivalent experience in program management.	Oversees the administration and management of organization including all program activities and staff.
6	Certified Teacher	A Florida teaching certification.	Ensures delivery of any service requiring a certified teaching staff.
7	Instructor/Facilitator	A high school diploma or General Equivalency Diploma (GED). Three years of work experience with children in the specialized area may substitute for the high school diploma or General Equivalency Diploma (GED).	Delivers specialized enrichment activities in a particular subject matter area, but is not a certified teacher.

Position Category ID	Category Description	Qualifications - Minimum Expectations	Responsibilities
8	LPN/Medical Assistant/Health Aid	Current licensure by state boards of Professional Regulation and Education, with a current CPR/ First Aid Certification.	Assists registered nurses in the provision of direct nursing care and health prevention activities per assigned duties included in the position job description.
9	Mental Health/Social Services Professional	Master’s degree in psychology, social work, marriage and family therapy, mental health counseling or related field.	Provides behavioral health services and prevention activities - per program model and assigned duties included in the position job description.
10	Other	<p style="text-align: center;"><Open Text></p> <p>Note: This section would populate “blank” in the Contracts - Staffing Plan. The “Other” category description should ONLY be used if the existing qualifications found in all other selections do not match at a minimum with the qualifications expected for the position.</p>	<p style="text-align: center;"><Open Text></p> <p>Note: This section would populate “blank” in the Contracts – Staffing Plan. The “Other” category description should ONLY be used if the existing responsibilities found in all other selections do not match at a minimum with the qualifications expected for the position.</p>
11	Other Health Professional (Allied)	Bachelor Degree in the Allied Health field with one year experience.	Provides ancillary health services - per program model and assigned duties included in the position job description.

Position Category ID	Category Description	Qualifications - Minimum Expectations	Responsibilities
12	Program Management	Bachelor Degree or equivalent experience in program management.	Provides direction for the program's day to day operations, supervision, direction and guidance for staff, assures implementation of evidence based curriculum or program protocols with fidelity.
13	Registered Nurse	Current licensure by state boards of Professional Regulation and Education, with a current CPR/ First Aid Certification. A bachelor of science in nursing (BSN) is required for nurses assigned to high schools.	Provides direct nursing care and health prevention activities per assigned duties included in the position job description.
14	Services - Para-professional	A high school diploma or General Equivalency Diploma (GED).	Provides program support and directly interacts with participants.
15	Support Staff	A high school diploma or General Equivalency Diploma (GED).	Performs other duties related to program delivery. May be responsible for a variety of assignments such as bus driver, cook, and maintenance worker, etc.
17	Teen Trendsetter Youth	High School Student	Mentor to elementary students.
16	Volunteer	A high school diploma or General Equivalency Diploma (GED).	Provides various duties and task on voluntary basis.

***FNPS providers utilize the "Success Coach" for Care Coordinators.**