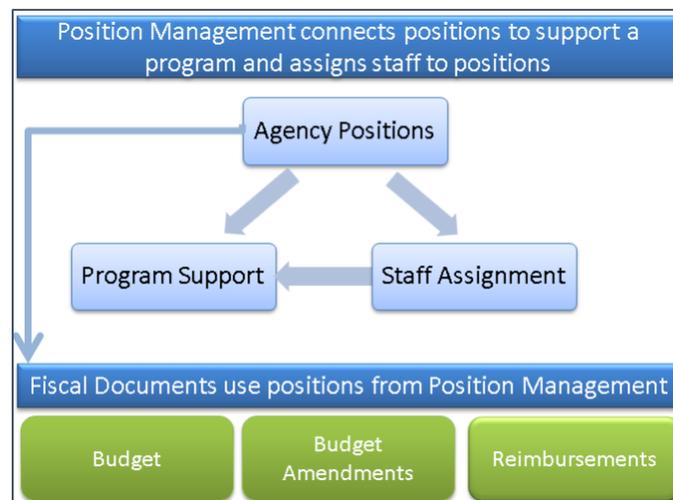


Position Management Guide

The **Positions** formerly known as **Position Management** function serves as a central database where Trust Central – SAMIS 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: The Positions tab does not allocate funds to a position. **This must be completed prior to creating a budget and must be updated before submitting any fiscal document.** To ensure confidentiality, this section can be only accessed for users that have access to SAMIS – Fiscal.

To understand the importance of Positions (Position Management), let's use the following diagram:



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 Support**, and it refers to the number of hours per week dedicated to the Program. terminate the support period. terminate the support period.

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

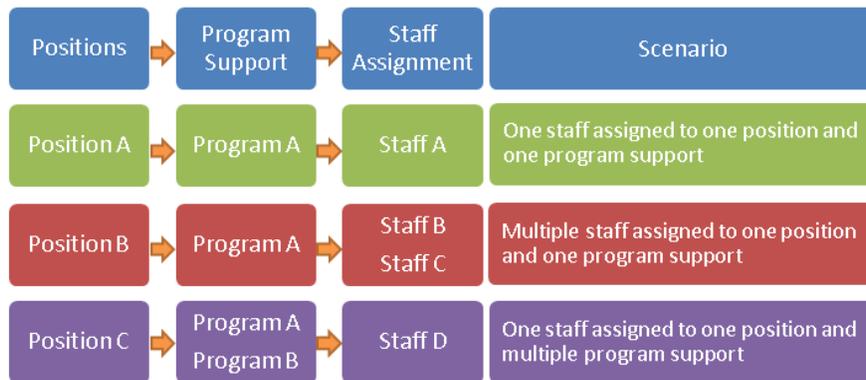
Positions can be used across multiple fiscal years. Therefore, **only** new positions or changes to existing records need to be made when negotiating new budgets.



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 SAMIS. The positions and staff assignments can be set-up under a Program Support and Staff Assignment must be established. Program 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.

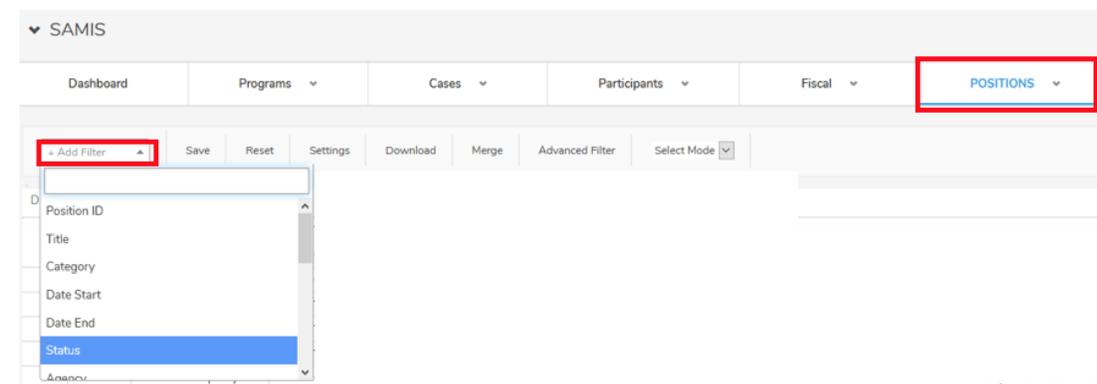


Pooled Position: is a **group of five or more identical positions** (pooled position). However, The Children’s Trust does not recommend the use of pooled position. Only in a special situation, may a pooled position be used, and it must be approved. Please contact your Contract Manager to ensure that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

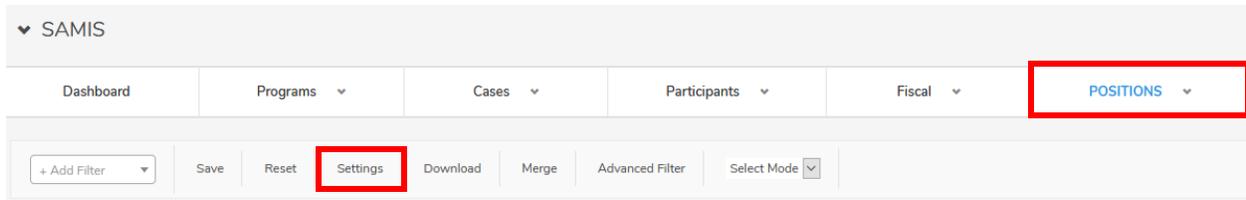
The positions are listed in a **grid**. The grids can be modified based on your preference and need.

Search (Filters): Use the “Add Filter” dropdown to search for specific items within the grid. 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 “Settings” function located in the positions sub menu to customize the grid.



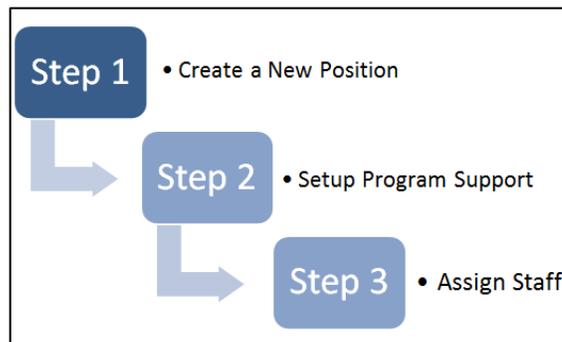
By selecting the option, the system will generate a separate window with the all possible items it can be added to the grid. These items are listed under “columns” section. The grid functionality can be also customized. Use the “settings” option from the “Grid Settings” to modify the table. By default,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

Grid Settings



How to create a new position

There are three (3) main steps that must be completed in order to have Positions correctly setup in SAMIS. Before starting to create new positions in SAMIS, 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)



- a. Choose the agency from the **Agency** dropdown list.
- b. Enter the title of the position in the **Title** field. This title must agree with the title at the agency/payroll.
- c. 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.**
- d. Enter the expected hours per week that this position works at the agency in the **Expected Hours/Wk** field.
- e. 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.
- f. Leave **Position End Date** in blank. Position End Date is entered only when terminating the position.
- g. Select **SAVE** () to save the changes without adding the program support. **OR**
- h. Select **Cancel** () to cancel the changes and return the position’s grids.

Position:

* Agency	<input type="text" value="Enter Agency Name"/>
* Title	<input type="text"/>
* Category	<input type="text" value="Select One"/>
* Expected Hours / Wk	<input type="text"/>
* Position Start Date	<input type="text" value="Calendar icon"/>
Position End Date	<input type="text" value="Calendar icon"/>



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

Staff	Hours / Wk	Assignment Start	Assignment End	Termination	
<input type="text"/>	<input type="text"/>	<input type="text"/>			<input type="button" value="Remove"/>

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

Step 3 – Assign a Staff Member to the Program Support record.

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

- Type 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, click on **"Add Assignment."**

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.



Add New Staff

NOTE: Adding a new staff to the system does not automatically add the staff to the program. Once you add staff to the system by completing the form below, you

Agency Employee ID	<input type="text"/>
* First Name	<input type="text"/>
Middle Initial	<input type="text"/>
* Last Name	<input type="text"/>
Race	Select One
Ethnicity	Select One
Gender	<input type="radio"/> Female <input type="radio"/> Male
Language Spoken	<input type="checkbox"/> English <input type="checkbox"/> Spanish <input type="checkbox"/> Haitian Creole <input type="checkbox"/> Other
* Currently Active	<input checked="" type="radio"/> Yes <input type="radio"/> No

b. Once the “**Add Assignment**” is selected, a separate window will be generated to create the new staff. Complete the fields that have an asterisk (*) next to it. Click **Save** ().

c. Enter the “**hrs/wk**” expected for the program.

d. Select the staff start date from the calendar under the “**Assignment Start Date**” field.

e. Click **Save** ().

How to record a termination

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

- The **staff** position at the agency or leaves the agency. (i.e., the staff gets a promotion or retires.,) the staff gets a promotion or retires.)
- The **program support** records may occur as a result of either the Position terminating at the Agency or Program level. 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 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 the staff is being linked to.
3. Once in the position, click on **“Modify”** located underneath the position’s title.
4. Enter the termination date from the calendar in the **“Assignment End Date”** field.
5. Select the termination reason from the **“Status/Termination Reason”** 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 Assignment” Step 3 (a-e)** from the **How to setup a new position** section (page 5).

HEALTH WORKER

Modify

Other Health Professional

ID: 1

Terminating Program Support

Program Support should be terminated if the program no longer supports this position. To terminate Program Support, 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 support is connected to.
3. Once in the position, click on **“Modify”** located underneath the position’s title.
4. Go to the **“Program Support”** you wish to terminate and select the termination date from the calendar under the **“Support End”** field.

Program Support

* Program: PAR XX99-9999 My Sunny Agency of Miami-Dade

* Support Start: 08/01/2016

Support End:

* Program %: 100

calendar under the **“Support End”** field.

5. Click on **“Save”** () the changes. Or **“Cancel”** () to return without saving.

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 to program support is connected to.

Position: 9999

* Agency: My Sunny Agency

* Title: Senior Teacher

* Category: Certified Teacher

* Expected Hours / Wk: 40

* Position Start Date: 03/01/2015

* Position End Date: [Calendar icon]

3. Once in the position, click on **“Modify”** located underneath the position’s tittle.
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 support as well as the staff termination. If the support end date is an earlier than the other two dates, the system would give an error message.

Fringe Benefits Position

The Fringe Benefits position is the position designated to enter the fringes calculations for **retirement, life and health insurance, workers compensation, and unemployment compensation for staff working directly on a funded program. FICA/MICA calculation would need to be reported at the position level.** Therefore, a position named **“Fringe Benefits”** must be set up in Position Management, before it can be used in a budget. As any other position, Fringe Benefits position is setup at the agency level, must be associated to one or more funded programs, and must have a staff assignment. A staff member named as Fringe Benefits needs to be created and will be used in the staff assignment. To create this position, follow the steps included in the **How to create and terminate Positions (Position Management) handout** using the following information:

Step 1 – Create a new Position	Position ID	Automatically assigned
	Agency	Select your Agency from the dropdown
	Category	Other
	Title	Fringe Benefits
	Expected Hours / Wk	40
	Position Start Date	Enter a start date
	Position End Date	Leave this field in blank



	SAVE	Press SAVE to save changes or CANCEL to exit without saving
Sept 2 – Add New Program Support	Program	Select your Program from the dropdown list
	Program Support Start Date	Enter the program support start date.
	Program Support End Date	Leave this field in blank
	Program %	100%
	SAVE	Press SAVE to save changes or CANCEL to exit without saving
Step 3 – Add new Staff Assignment	Staff Member	Add a new staff member
	First Name	Fringe
	Last Name	Benefits
	Hours/Wk	40
	Assignment Start Date	Enter the staff assignment start date.
	Assignment End Date	Leave this field in blank
	SAVE	Press SAVE to save changes or CANCEL to exit without saving

Also, the budget includes another fringe benefits account called “**Fringe Benefits Other**”. This account is used to report other fringes outside of the ones mentioned above. Given that not all agencies may have other fringes, if any are applicable, could be enter in this account. However, this allocation would need to be authorized by your Contract Manager. Before you do so, please contact him/her for approval.

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Position Management 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 set-up 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.

