

TPM 2A Short Forms

Chapter Topics

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Using 2A Transactions

2A requests are used to reclassify and/or move positions. 2A and 1A transactions can be submitted in one Request if appropriate.

2A - 71

Use to reclassify a position to another existing, pre-approved title. Decentralized agencies can use this page to reclassify positions to titles with standards. Agencies with standard staffing patterns may also use this page.

2A - 72

Use to reclassify and change the line item number of a position to an existing, pre-approved title. Decentralized agencies can use this page to reclassify positions to titles with standards. Agencies with standard staffing patterns may also use this page.

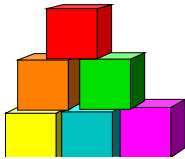
2A - 73

Within a roll-up agency, use to simultaneously reclassify and move an existing position to a different agency code, with or without a change in line item number, consistent with other authorizations.

2A - 74

Within an agency, use to change the line item number with or without change in funding code, and/or the location code.

Within a roll-up agency, use to move a position from one agency/facility to another, with or without a line item number change.




Position Reclassification to an Existing Title—without Line Item Change

The Short Form Position Reclassification to an Existing Title – without a Line Item Change (2A - 71) page is used to request the reclassification of a position to an existing, pre-approved title, using the “short form” reclassification process. Decentralized agencies may use the form for titles that have classification standards. Agencies with approved staffing patterns may also use the short form process. Use this page only for those pre-approved titles with standard and consistent attributes (salary grade, jurisdictional class, and negotiating unit).



Access the Page

1. Click  **Worklist**.
A Worklist page will display.
2. Select the transaction to be worked.

2A –71 Request Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Short Form Requests > Use > 1A/2A Transactions

Request Documents CC/DOB Determination Fund Info Comments CC Comments

*Agency: 08000 Civil Service Trx Sumry Job Control #: 0304-12881

Requests View All First 1 of 1 Last

*Div Bur/Inst: Administration Request Status: Agency Submitted

*Form CD: 2A *Action CD: 71 *Proposed Eff Date: 10/09/2003

POS Req: 1 Line # Range Begin: 04087 End: Location: 0110
Albany

TC: 0849200 Data Entry Mach Oper SG: 06 JC: 0 NU: 02 Pool ID: 007

Prop TC: 2501206 Clerk 1 Spanish Lang SG: 06 JC: 0 NU: 02


Proposed Rate
 Hourly Annual NTE SG ED

C/C Assignment
 Section Head: Stallone, Rocky Assigned Analyst: LAR99 [Route To](#)

Req Date: 10/15/2003 Requestor: Sunshine, Suzy

[Save](#) [Return to Search](#)

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)

Field	Description
Agency	The Agency Code and name requesting the transaction.
Trx Sumry	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.
Request Status	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
Proposed Eff. Date	The proposed effective date for the reclassification.
# POS Req	The number of positions requested for reclassification.
Line # Range: Begin	The beginning line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
Line # Range End	The ending line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
Location	The Location code and geographic description of the position(s).
TC	The Title Code and description of the position(s).
SG	The Salary Grade of the position(s).
JC	The Jurisdictional Classification of the position(s).
NU	The Negotiating Unit of the position(s).
Pool ID	Indicates from which PayServ funding source the position is being paid.
View Pos	When pressed, a secondary page appears with all line items in the range. Shows the Title description, SG, JC, NU, and location.
 (Correction)	When pressed, opens those data fields that are not available on the determination page for modification.
Audit	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
Prop. TC	The proposed Title Code and description of the position(s).

Field	Description
SG	The Salary Grade of the requested title.
JC	The Jurisdictional Classification of the requested title.
NU	The Negotiating Unit of the requested title.
Proposed Rate	The proposed rate of the requested position if NS.
C/C Assignment	The area of the page that displays the C&C staff assigned to the transaction.
Section Head	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
Assigned Analyst	The C&C Analyst assigned to this transaction.
Route To/It	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
Role User	The C&C staff member to whom you want to route the transaction to for review and/or approval.
Req. Date	Date the request was submitted.
Requestor	The person requesting the transaction.

2A – 71 Documents Page Field Descriptions

See Documents section of this manual.

2A – 71 CC/DOB Determination Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Short Form Requests > Use > 1A/2A Transactions

Request Documents CC/DOB Determination Fund Info Comments CC Comments

Agency: 08000 Civil Service [Trx Sumry](#) Job Control #: 0304-12881

Requests View All First 1 of 1 Last

Div/Bur/Inst: Administration Request Status: Agency Submitted

Form CD: 2A Action CD: 71

CC Determination

Action:	Prop TC / Appr TC:	Description:	SG:	JC:	NU:
App. As Requested	2501206	Clerk 1 Spanish Lang	06	0	02
	2501206	Clerk 1 Spanish Lang	06	0	02

Streamlined?

Positions

Positions Req: 1 Approved: 1 Disapproved:

Determination Dt: Analyst:

Eff Date: 10/10/2003


Budget Determination

Line #(Range) Approved: thru:

Positions

CC Apprv: 1 Approved: Disapproved: Eff Date:

Determination Dt: Examiner:

[Route To](#)  [Submit](#)

[Save](#) [Return to Search](#)

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)



NOTE: The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
Agency	The Agency Code and name requesting the transaction.
Trx Sumry	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.
Request Status	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.

Field	Description
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
C/C Determination	The area of the page C&C uses to record their determination.
Action	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
Prop. TC	The Title Code requested.
Description	Description of the title requested.
SG	The Salary Grade of the title requested.
JC	The Jurisdictional Classification of the title requested.
NU	The Negotiating Unit of the title requested.
Disp. Date	Disposal Date (appears only if the Action is "Withdraw" or "Deny").
Appr. TC	Approved Title Code.
Description	Description of the Approved Title.
SG	The approved Salary Grade.
JC	The approved Jurisdictional Classification.
NU	The approved Negotiating Unit.
Streamlined	The Analyst will streamline transactions consistent with the Division of the Budget's policy. If the requesting agency is 07950, 11340, 55020, 55090, 55095, or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination. If the requesting agency is not one of the above mentioned, and the box is not checked, the transaction is routed to DOB for final determination.
Rate	Appears only if NS. Select the basis of the rate and the actual rate.
# Positions Req.	The number of positions requested to be reclassified.
Approved	The number of positions C&C approved.
Disapproved	The number of positions C&C disapproved.
Eff. Date	The date the reclassification becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.
Determination Dt	The date the determination was made by C&C.
Analyst	The C&C Analyst assigned to this transaction.

Field	Description
Budget Determination	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
Action	Approved as Requested, Denied, Withdrawn.
Line # Range Approved: thru	System generated. The line number range of the approved position(s).
# Positions	Determination information on the positions.
C&C Apprv	Number of positions C&C approved.
Approved	Number of positions DOB approved.
Disapproved	Number of positions DOB disapproved.
Eff. Date	The date the reclassification becomes effective.
Determination Dt	The date the determination was made by DOB.
Examiner	The DOB Examiner assigned to the transaction.
Route To/lt	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
Role User	The C&C staff member to whom you want to route the transaction to for review and/or approval.
Global	When pressed, allows the user to enter values globally (for all sequences within the transaction).
Submit	Submits the transaction to the next approval level.

2A – 71 Fund Info Page Field Descriptions

Field	Description
Agency	The Agency Code and name requesting the transaction.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
Item Range: to:	The range of line items requested.
Title	Title Code and description.
SG	Salary Grade.

Field	Description
JC	Jurisdictional Classification.
NU	Negotiating Unit.
Funding	The area of the page that displays the funding information.
Pool ID	Indicates from which PayServ funding source the position is being paid.
Program	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Fund	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Subfund	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Fund Type	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.

2A – 71 Comments & CC Comments Pages Field Descriptions



NOTE: Comments are not required for a 2A - 71 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
Agency	The Agency Code and name requesting the transaction.
Job Control #	System generated number that will display upon saving or submitting.
Request Level Comments	Free form field that allows users to enter comments for the entire Job Control number. The field will allow up to 254 characters.
Sequence Level Comments	Free form field that allows users to enter comments related to the Job Seq number. The field will allow up to 8000 characters.
Div Bur/Inst	The Division, Bureau or Institution within the agency.





Work with the Page



NOTE: For instructions as to how to initiate a short form transaction, please refer to the appropriate section of the Agency User Manual.





NOTE: If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request. Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.

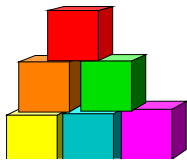
1. Check any attached documents and the **Comments** page for any additional information.
2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.



NOTE: If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

4. In the **Appr. TC** field, click the , highlight the appropriate title code (must be an active title) and double click to select. The code may also be manually entered.
5. In the **# Positions Req. Approved** field, enter the number of positions C&C is approving, if different than requested.
6. If streamlining, check the **Streamlined?** box and in the **Eff. Date** field, enter the effective date of the transaction if different than the system generated date.
7. Click the **Documents** page tab.
8. Attach any appropriate documents (see instructions in the Documents section of this manual).
9. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the CC Comments page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.

10. Click the **CC/DOB Determination** page tab.
11. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
12. If this transaction does not need to be routed, click **Submit**.




Position Reclassification to an Existing Title—with Line Item Change

The Short Form Position Reclassification to an Existing Title – with a Line Item Change (2A - 72) page is used to request the reclassification of a position to an existing, pre-approved title using the “short form” reclassification process. At the same time, it will change the line number of the position. Decentralized agencies may use the form for titles that have classification standards. Agencies with approved staffing patterns may also use the short form process. Use this page only for those pre-approved titles with standard and consistent attributes (salary grade, jurisdictional class, and negotiating unit).



Access the Page

1. Click  **Worklist**.
A Worklist page will display.
2. Select the transaction to be worked.

2A –72 Request Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Short Form Requests > Use > 1A/2A Transactions

Request Documents CC/DOB Determination Fund Info Comments CC Comments

*Agency: 14020 Labor [Trx Summ](#) Job Control #: 0304-12162

Requests View All First 1 of 2 Last

*Div Bur/Inst: Division of Smart People Request Status: Agency Submitted

*Form CD: 2A *Action CD: 72 *Proposed Eff Date: 09/10/2003

POS Req: 1 Line # Range Begin: 00489 End: Location: 0110 Albany

TC: 1441400 Assoc Persnl Admr SG: 23 JC: 0 NU: 06 Pool ID: 001

Prop TC: 1442100 Assnt Dir Pers B SG: 01 JC: 0 NU: 06

Chg to Loc: 0110 Albany

Proposed Rate: Hourly Annual NTE SG EQ

Change to Line # Range Begin: 00630 End: Pool ID: 001


C/C Assignment

Section Head: Stallone,Rocky Assigned Analyst: LAR99 [Route To](#)

Req Date: 09/05/2003 Requestor: Ismore,Les

[Save](#) [Return to Search](#) [Next in List](#) [Previous in List](#)

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)

Field	Description
Agency	The Agency Code and name requesting the transaction.
Trx Sumry	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.
Request Status	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
Proposed Eff. Date	The proposed effective date for the reclassification.
# Pos Req	The number of positions requested for reclassification.
Line # Range Begin	The beginning line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
Line # Range End	The ending line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
Location	The Location code and geographic description of the position.
TC	The Title Code and description of the position(s).
SG	The Salary Grade of the position(s).
JC	The Jurisdictional Classification of the position(s).
NU	The Negotiating Unit of the position(s).
Pool ID	Indicates from which PayServ funding source the position is being paid.
 (Correction)	When pressed, opens those data fields that are not available on the determination page for modification.
Audit	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
Prop. TC	The proposed Title Code and description for the position(s).
SG	The Salary Grade of the requested title.

Field	Description
JC	The Jurisdictional Classification of the requested title.
NU	The Negotiating Unit of the requested title.
Chg. To Loc	The proposed Location of the position. If there are various locations within the request the value 9999 should be selected.
Proposed Rate	The proposed rate of the requested position if NS.
To Line # Beginning	The beginning line # of the range that the position is being reclassified to. All line item numbers must not currently exist.
To Line # Ending	The ending line # of the range that the positions are being reclassified to. All line item numbers must not currently exist.
Pool ID	Indicates from which PayServ funding source the position is being paid.
C/C Assignment	The area of the page that displays the C&C staff assigned to the transaction.
Section Head	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
Assigned Analyst	The C&C Analyst assigned to this transaction.
Route To/It	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
Role User	The C&C staff member to whom you want to route the transaction to for review/approval.
Req. Date	Date the request was submitted.
Requestor	The person requesting the transaction.

2A – 72 Document Page Field Descriptions

See Documents Section of this manual.

2A – 72 CC/DOB Determination Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Short Form Requests](#) > [Use](#) > **1A/2A Transactions**

Request Documents **CC/DOB Determination** Fund Info Comments CC Comments

Agency: 14020 Labor [Trx Sumry](#) Job Control #: 0304-12162

Requests View All First 1 of 2 Last

Div/Bur/Inst: Division of Smart People Request Status: Agency Submitted
 Form CD: 2A Action CD: 72

CC Determination

Action:	Prop TC / Appr TC:	Description:	SG:	JC:	NU:
App. As Requested	1442100	Assnt Dir Pers B	61	0	06
	1442100	Assnt Dir Pers B	61	0	06

Streamlined?

Positions

Positions Req: 1 Approved: 1 Disapproved:

Determination Dt: Analyst:

Budget Determination

Line #(Range) Approved: thru:

Positions

CC Apprv: 1 Approved: Disapproved: Eff Date:

Determination Dt: Examiner:

Route To
Submit

Save
Return to Search
Next in List
Previous in List

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)



NOTE: The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
Agency	The Agency Code and name requesting the transaction.
Trx Sumry	When pressed, brings the user to the transaction summary page.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.

Field	Description
Request Status	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
C/C Determination	The area of the page C&C uses to record their determination.
Action	Approve with change, Approve as Requested, Approve as Requested with letter, Deny, Return For Additional Information, Withdraw.
Prop. TC	The Title Code of the requested title.
Description	Description of the requested title.
SG	The Salary Grade of the requested title.
JC	The Jurisdictional Classification of the requested title.
NU	The Negotiating Unit of the requested title.
Disp. Date	Disposal Date (appears only if the Action is "Withdraw" or "Deny").
Appr. TC	Approved Title Code.
Description	Description of the Approved Title Code.
SG	The C&C approved Salary Grade.
JC	The C&C approved Jurisdictional Classification.
NU	The C&C approved Negotiating Unit.
Streamlined	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 07950, 11340, 55020, 55090, 55095, or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination. If the requesting agency is not one of the above mentioned, and the box is not checked, the transaction is routed to DOB for final determination.
# Positions Req.	The number of positions requested.
Approved	The number of positions C&C approved.
Disapproved	The number of positions C&C disapproved.
Eff. Date	The date the reclassification becomes effective (appears only if streamlined). Default is proposed effective date but may be changed.
Determination Dt	The date the determination was made by C&C.

Field	Description
Analyst	The C&C Analyst assigned to this transaction.
Budget Determination	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
Action	Approved as Requested, Denied, Withdrawn.
Line # (Range) Approved: thru	System generated. The line number range of the approved position(s).
# Positions	Determination information on the positions.
C&C Apprv	Number of positions C&C approved.
Approved	Number of positions DOB approved.
Disapproved	Number of positions DOB disapproved.
Eff. Date	The date the position becomes effective. This value cannot be more than 30 days in the future or 12 months in the past.
Determination Dt	The date the determination was made by DOB.
Examiner	The DOB Examiner assigned to the transaction.
Route To/It	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
Role User	The C&C staff member to whom you want to route the transaction to for review/approval.
Global	When pressed, allows the user to enter values globally (for all sequences within the transaction).
Submit	Submits the transaction to the next approval level.

2A – 72 Fund Info Page Field Descriptions

Field	Description
Agency	The Agency Code and name requesting the transaction.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
Item Range: to:	The range of line items requested.
Title	Title Code and description.

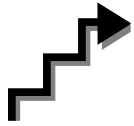
Field	Description
SG	Salary Grade.
JC	Jurisdictional Classification.
NU	Negotiating Unit.
Change to Line Range: to:	The beginning and ending line # of the range that the position is being reclassified to.
Funding	The area of the page that displays the funding information.
Pool ID	Indicates from which PayServ funding source the position is being paid.
Program	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Fund	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Subfund	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Fund Type	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.

2A – 72 Comments Page Field Descriptions



NOTE: Comments are not required for a 2A 72 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
Agency	The Agency Code and name requesting the transaction.
Job Control #	System generated number that will display upon saving or submitting.
Request Level Comments	Free form field that allows users to enter comments for the entire Job Control number. The field will allow up to 254 characters.
Sequence Level Comments	Free form field that allows users to enter comments related to the Job Seq number. The field will allow up to 8000 characters.
Div Bur/Inst	The Division, Bureau or Institution within the agency.




Work with the Page




NOTE: For instructions as to how to initiate a short form transaction, please refer to the appropriate section of the Agency User Manual.




NOTE: If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request.

Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.


1. Check any attached documents and the **Comments** page for any additional information.
2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.

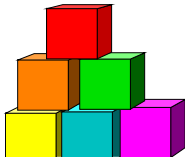


NOTE: If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

4. In the **Appr. TC** field, click the , highlight the appropriate title code (must be an active title) and double click to select. The code may also be manually entered.
5. In the **# Positions Approved** field, enter the number of positions C&C is approving.
6. If streamlining, check the **Streamlined?** box and in the **Eff. Date** field, enter the effective date of the transaction if different than the system generated date.
7. If NS, in the **Rate Info** field, enter the appropriate rate information.
8. Click the **Documents** page tab to add any documents.
9. Attach any appropriate documents (see instructions in the Documents section of this manual).
10. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the CC Comments page.* In the **Request Level Comments** field, enter any comments

that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.

11. Click the **CC/DOB Determination** page tab.
12. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
13. If this transaction does not need to be routed, click **Submit**.




Position Reclassification to an Existing Title—with Line Item Change & Move to New Division/Department/Institution

The Short Form Position Reclassification to an Existing Title – with a Line Item Change & Move to New Division/Department/Institution (2A - 73) page is used to request the reclassification of an existing position to a pre-approved title, change the line number and simultaneously move the position to another agency code within a roll up agency. Decentralized agencies may use the form for titles that have classification standards. Agencies with approved staffing patterns may also use the short form process.



Access the Page

1. Click  **Worklist**.
A Worklist page will display.
2. Select the transaction to be worked.

2A –73 Request Page Field Descriptions

Home > NY Title and Position Mgmt > TPM Short Form Requests > Use > 1A/2A Transactions

Request Documents CC/DOB Determination Fund Info Comments CC Comments

*Agency: 11000 Ed Main Office [Trx Sumry](#) Job Control #: 0304-12433

Requests View All First 1 of 4 Last

*Div Bur/Inst: [] Request Status: Agency Submitted

*Form CD: 2A *Action CD: 73 *Proposed Eff Date: 09/15/2003

Line # Range Location: 0110
POS Req: 1 Begin: 02020 End: Albany

TC: 0820305 Senr Comptr Prog An SG: 18 JC: 0 NU: 05 Pool ID: 412

Prop TC: 0820410 Assoc Comptr Prgmr An SG: 23 JC: 0 NU: 05

Chg to Loc: 0110 Albany

Proposed Rate Change to Line # Range
Hourly Annual NTE SG EQ Begin: 07111 End:

Chgd To Agency: 11270 Div Bur/Inst: Ed Sch Deaf Pool ID: 012


C/C Assignment

Section Head: Stallone,Rocky Assigned Analyst: LAR99 [Route To](#)

Req Date: 09/23/2003 Requestor: Ablanc,Drew

[Save](#) [Return to Search](#)

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)

Field	Description
Agency	The Agency Code and name requesting the transaction.
Trx Sumry	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.
Request Status	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
Proposed Eff. Date	The proposed effective date for the reclassification.
# Pos Req	The number of positions requested for reclassification.
Line # Range Begin	The beginning line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
Line # Range End	The ending line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
Location	The Location code and geographic description of the position(s).
TC	The Title Code and description of the position(s).
SG	The Salary Grade of the position(s).
JC	The Jurisdictional Classification of the position(s).
NU	The Negotiating Unit of the position(s).
Pool ID	Indicates from which PayServ funding source the position is being paid.
 (Correction)	When pressed, opens those data fields that are not available on the determination page for modification.
Audit	This button only appears if C&C has made any changes to the values of the originally submitted transaction. When pressed, a pop-up page displays with the original values.
Prop. TC	The proposed Title Code and description of the position(s).
SG	The Salary Grade of the requested title.
JC	The Jurisdictional Classification of the requested title.

Field	Description
NU	The Negotiating Unit of the requested title.
Chg to Loc	The location the position is being moved to.
To Line # Beginning	The new beginning line #.
To Line # Ending	The new ending line #.
Proposed Rate	The proposed rate of the requested position if NS.
Chgd to Agency	The Agency Code to which the position is being moved.
Div/Bur/Inst	The Division, Bureau or Institution the position is being moved to.
Pool ID	Indicates from which PayServ funding source the position will be paid.
C/C Assignment	The area of the page that displays the C&C staff assigned to the transaction.
Section Head	The C&C Section Head to whom the transaction is routed based upon the Dept ID of the Requestor. This value is overwritten when routed to another Section Head. The last Section Head to receive the package before it has been approved, denied, withdrawn, or sent back for additional info, is saved to the record.
Assigned Analyst	The C&C Analyst assigned to this transaction.
Route To/It	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
Role User	The C&C staff member to whom you want to route the transaction to for review and/or approval.
Req. Date	Date the request was submitted.
Requestor	The person requesting the transaction.

2A – 73 Documents Page Field Descriptions

See Documents section of this manual.

2A – 73 CC/DOB Determination Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Short Form Requests](#) > [Use](#) > [1A/2A Transactions](#)

Request Documents **CC/DOB Determination** Fund Info Comments CC Comments

Agency: 11000 Ed Main Office [Trx Sumry](#) Job Control #: 0304-12433

Requests View All First 1 of 1 Last

Div/Bur/Inst: x Request Status: Agency Submitted

Form CD: 2A Action CD: 73

CC Determination

Action:	Prop TC / Appr TC:	Description:	SG:	JC:	NU:
Approved With Chang	0820410	Assoc Comptr Prgmr An	23	0	05
	0820410	Assoc Comptr Prgmr An	23	0	05

Streamlined?

Positions

Positions Req: 1 Approved: 1 Disapproved:

Determination Dt: Analyst:


Budget Determination

Line #(Range) Approved: thru:

Positions

CC Apprv: 1 Approved: Disapproved: Eff Date:

Determination Dt: Examiner:

[Route To](#)  [Submit](#)

[Save](#) [Return to Search](#)

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)



NOTE: The Agency and DOB will only be able to view all the data on this page if the Request Status is Pending DOB Determination, DOB Approved, DOB Disapproved, DOB Withdrawn, or Sunset. If the Request Status is other than these values, the only values that will display are Agency, Div Bur/Inst, Job Control #, Action, and Request Status.

Field	Description
Agency	The Agency Code and name requesting the transaction.
Trx Sumry	When pressed, brings the user to the transaction summary page.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.

Field	Description
Request Status	The point the transaction is at in the approval process; i.e. Agency Submitted, C&C Approved, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, DOB Approved/C&C Streamlined, DOB Initiated, DOB Disapproved.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
C/C Determination	The area of the page C&C uses to record their determination.
Action	Approve with change, Approve with change with letter, Approve as Requested, Approve as requested with letter, Deny, Supplemental Information Requested, Withdraw.
Prop. TC	The proposed Title code.
Description	The description of the proposed Title.
SG	The Salary Grade assigned to the requested title.
JC	The Jurisdictional Classification of the requested title.
NU	The Negotiating Unit of the requested title.
Disp. Date	Disposal Date (appears only if the Action is "Withdraw" or "Deny").
Appr. TC	Approved Title Code.
Description	Description of the approved Title.
SG	The approved Salary Grade.
JC	The approved Jurisdictional Classification.
NU	The approved Negotiating Unit.
Streamlined	The Analyst will streamline transactions consistent with the Division of Budget's policy. If the requesting agency is 07950, 11340, 55020, 55090, 55095, or 00640 this transaction is considered streamlined (the box is checked) and stops with C&C determination. If the requesting agency is not one of the above mentioned, and the box is not checked, the transaction is routed to DOB for final determination.
# Positions Req.	The number of positions requested.
Approved	The number of positions C&C approved.
Disapproved	The number of positions C&C disapproved.
Eff. Date	The date the action becomes effective (appears only if streamlined). This value cannot be more than 30 days in the future, or 6 months in the past.
Determination Dt	The date the determination was made by C&C.

Field	Description
Analyst	The C&C Analyst assigned to this transaction.
Budget Determination	The area of the page that DOB uses to record their determination. Grayed if Streamlined, C&C Disapproved or Withdrawn.
Action	Approved as Requested, Denied, Withdrawn.
Line # (Range) Approved: thru:	System generated. The line number range of the approved position(s).
# Positions	Determination information on the positions.
C&C Apprv	Number of positions C&C approved.
Approved	Number of positions DOB approved.
Disapproved	Number of positions DOB disapproved.
Eff. Date	The date the reclassification becomes effective.
Determination Dt	The date the determination was made by DOB.
Examiner	The DOB Examiner assigned to the transaction.
Route To/It	When pressed, the Analyst can route the request to another Analyst for review and/or approval.
Role User	The C&C staff member to whom you want to route the transaction to for review and/or approval.
Global	When pressed, allows the user to enter values globally (for all sequences within the transaction).
Submit	Submits the transaction to the next approval level.

2A – 73 Fund Info Page Field Descriptions

Field	Description
Agency	The Agency Code and name requesting the transaction.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
Item Range: to:	The range of line items requested.
Title	Title Code and description.

Field	Description
SG	Salary Grade.
JC	Jurisdictional Classification.
NU	Negotiating Unit.
Change to Line Range	The beginning and ending number of the line range the positions are being moved to.
Changed to Agency	The Agency to which the position is being moved.
Change to Division Bureau/Inst	The Division, Bureau or Institution the position is being moved to.
Funding	The area of the page that displays the funding information.
Pool ID	Indicates from which PayServ funding source the position is being paid.
Program	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Fund	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Subfund	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Fund Type	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.

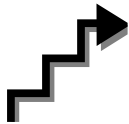
2A – 73 Comments & CC Comments Pages Field Descriptions



NOTE: Comments are not required for a 2A 73 transaction. Users outside of C&C cannot view any comments written in the **CC Comments** page.

Field	Description
Agency	The Agency Code and name requesting the transaction.
Job Control #	System generated number that will display upon saving or submitting.
Request Level Comments	Free form field that allows users to enter comments for the entire Job Control number. The field will allow up to 254 characters.

Field	Description
Sequence Level Comments	Free form field that allows users to enter comments related to the Job Seq number. The field will allow up to 8000 characters.
Div Bur/Inst	The Division, Bureau or Institution within the agency.




Work with the Page




NOTE: For instructions as to how to initiate a short form transaction, please refer to the appropriate section of the Agency User Manual.




NOTE: If a C&C Analyst must change any data on the originally submitted transaction, the Correction mode can be used to modify the request.

Clicking the Correction  icon on the request page opens those data fields that are not available on the determination page for modification.

1. Check any attached documents and the **Comments** page for any additional information.
2. Click the **CC/DOB Determination** page tab.
3. In the **Action** field, click the , highlight the appropriate action code and double click to select.




NOTE: If the Action is Withdraw or Deny, the system will populate the **Disp. Date** with the current date but C&C may modify.

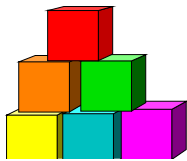
4. In the **Appr. TC** field, click the , highlight the appropriate title code (must be an active title) and double click to select. The code may also be manually entered.
5. In the **# Positions Req: Approved** field, enter the number of positions C&C is approving, if different than requested.
6. If streamlining, check the **Streamlined?** box and in the **Eff. Date** field, enter the effective date of the transaction if different than the system generated date.
7. If NS, enter the rate information.
8. Click the **Documents** page tab.

9. Attach any appropriate documents (see instructions in the Documents section of this manual).
10. If adding comments, click the appropriate **Comments** page tab. Comments are optional. *Remember that any user outside of C&C cannot view any comments made in the **CC Comments** page.* In the **Request Level Comments** field, enter any comments that relate to the entire package. In the **Sequence Level Comments** field, enter any comments that relate to individual sequences.
11. Click the **CC/DOB Determination** page tab.



NOTE: On either the Request page or the Determination page, the Assigned Analyst must be entered before C&C can submit the transaction.

12. If this transaction needs to be routed, press the **Route To** button. In the **Role User** field, click , highlight and double click the appropriate name. Click **Route It**. The system will ask for confirmation. Press **Yes** if the request should be forwarded, **No** if not.
13. If this transaction does not need to be routed, click **Submit**.



Line Item Change or Position Movement without a Reclassification


The Short Form Line Item Change or Position Movement without a Reclassification (2A - 74) page is used to request a change in item number with or without a funding source change, organizational placement or payroll agency of a position when there is no reclassification.

While C&C does not have a direct hand in dealing with position movement transactions, they may be asked for input from agencies when one is being put together. Additionally, C&C can view position movement requests.

For some agencies, these transactions are automatically streamlined and do not go to DOB. When this occurs, the **Request Status** will read **Agency Approved** on the determination page.



Access the Page

1. Click  **Worklist**.
A *Worklist* page will display.
2. Select the transaction to be worked.

2A -74 Request Page Field Descriptions

Home > NY Title and Position Mgmt > TPM ShortForm Requests > Use > 1A/2A Transactions

Request: 23000 Motor Vehicles Trx Summary Job Control # 0203-16232

Requests View All First 1 of 1 Last

*Div Bur/Inst: Field Operations Request Status: Agency Submitted

*Form CD: 2A *Action CD: 74 *Proposed Eff Date: 11/07/2002

POS Req: 1 Line # Range: Begin: 25361 End: Location: 6060
Yonkers

TC: 2540000 Motor Veh Rep SG: 09 JC: 0 NR: 02 Pool ID: 108

Chg to Loc: 6060 Yonkers Change to Line # Range
Begin: 67641 End:

Chgd To Agency: 23000 Div Bur/Inst: Insurance Field Operations Pool ID: 275

C&C Assignment

Section Head: Assigned Analyst:

Req Date: 11/07/2002 Requestor: Deweath, Sharon

[Save](#) [Return to Search](#)

Request | Documents | CC/DOB Determination | Fund Info | Comments | CC Comments

Field	Description
Agency	The Agency Code and name requesting the transaction.
Trx Sumry	When pressed, brings the user to the transaction summary page. Hidden until request is submitted.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.
Request Status	The point the transaction is at in the approval process; i.e. Agency Submitted, Agency Approved, C&C Supp. Info Requested, C&C Disapproved, C&C Submitted, C&C Withdrawn, Pending DOB Determination, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
Proposed Eff. Date	The proposed effective date for the action.
# Pos Req	The number of positions to be moved.
Line # Range Begin	The beginning line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
Line # Range End	The ending line number of the position(s). All line item numbers must currently exist, must be contiguous, and must have the same attributes.
Location	The Location code and geographic description of the position(s).
TC	The Title Code and description of the requested position(s).
SG	The Salary Grade of the subject position(s).
JC	The Jurisdictional Classification of the position(s).
NU	The Negotiating Unit of the position(s).
Pool ID	Indicates from which PayServ funding source the position is being paid.
Chg to Loc	The Location where the positions are being moved to.
To Line # Beginning	The new beginning line number of the position(s).
To Line # Ending	The new ending line number of the position(s).
Chgd to Agency	The Agency to which the position is being moved.
Div/Bur/Inst	The Division, Bureau or Institution to which the position is being moved.

Field	Description
Pool ID	Indicates from which PayServ funding source the position will be paid.
C&C Assignment	N/A for 2A 74 transactions.
Req. Date	Date the request was submitted.
Requestor	The person requesting the transaction.

2A – 74 Document Page Field Descriptions

See Documents section of this manual.

2A – 74 Determination Page Field Descriptions

[Home](#) > [NY Title and Position Mgmt](#) > [TPM Short Form Requests](#) > [Use](#) > **1A/2A Transactions**

Request Documents **CC/DOB Determination** Fund Info Comments CC Comments

Agency: 23000 Motor Vehicles [Trx Sumry](#) Job Control #: 0203-16232

Requests View All First 1 of 1 Last

Div/Bur/Inst: Field Operations Request Status: Agency Submitted
 Form CD: 2A Action CD: 74

Budget Determination

Line #(Range) Approved: thru:

Positions

Apprv: 1 Approved: Disapproved: Eff Date:

Determination Dt: Examiner:

Submit

Save Return to Search

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#) | [CC Comments](#)

Field	Description
Agency	The Agency Code and name requesting the transaction.
Trx Sumry	When pressed, brings the user to the transaction summary page.

Field	Description
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.
Request Status	The point the transaction is at in the approval process; i.e. Agency Submitted, Agency Approved, DOB Initiated, DOB Approved/C&C Streamlined, DOB Disapproved, DOB Withdrawn, Sunset.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
Budget Determination	The area of the page DOB uses to record their determination. Grayed if streamlined.
Action	Approved as Requested, Denied, Withdrawn.
Line # (Range) Approved: thru:	The beginning and ending line number of the range of the approved positions.
# Positions Apprv	The number of requested positions.
Approved	Number of positions DOB approved.
Disapproved	Number of positions DOB disapproved.
Eff. Date	The date the movement becomes effective.
Determination Dt	The date the determination was made by DOB.
Examiner	The DOB Examiner assigned to the transaction.
Submit	Submits the transaction to the NYSTEP System.

2A – 74 Fund Info Page Field Descriptions

Field	Description
Agency	The Agency Code and name requesting the transaction.
Job Control #	System generated number that will display upon saving or submitting.
Div Bur/Inst	The Division, Bureau or Institution within the agency.
Form CD	The code of the type of transaction being requested; i.e. 1A or 2A.
Action CD	The action code related to the form code; i.e. 71, 72, etc.
Item Range: to:	The range of line items requested.
Change to Line Range: To:	The beginning and ending number of the line range the positions are being moved to.

Field	Description
Changed to Agency	The Agency to which the position is being moved.
Change to Division Bureau/Inst	The Division, Bureau or Institution the position is being moved to.
Funding	The area of the page that displays the funding information.
Pool ID	Indicates from which PayServ funding source the position is being paid.
Program	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Fund	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Subfund	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.
Fund Type	If the value entered in the Pool ID is currently active, this field is displayed and grayed. If the requesting agency is 07950, 11340, 55020, 55090, or 55095 this field is hidden.

2A – 74 Comments & CC Comments Pages Field Descriptions



NOTE: The Comments pages are not available for use by C&C Analysts.

Field	Description
Agency	The Agency Code and name requesting the transaction.
Job Control #	System generated number that will display upon saving or submitting.
Request Level Comments	Free form field that allows users to enter comments for the entire Job Control number. The field will allow up to 254 characters.
Sequence Level Comments	Free form field that allows users to enter comments related to the Job Seq number. The field will allow up to 8000 characters.
Div Bur/Inst	The Division, Bureau or Institution within the agency.