

## Appendix: Actions Glossary

Action	Definition	Result	Comments
End Employment	Use to indicate resignation, retirement, termination or break in service from the District - voluntary or involuntary.	FTE will display as 0.0 on this row. A vacancy is automatically created for the position. User is responsible for managing the vacancy.	Cannot be used in place of Unassignment.
Fill Vacancy	Use to Fill any vacant position.	Position information copies down. Enter an applicant or employee name and employee ID number (if current PPS employee).	Action is only available for use in the Vacant Positions section. May be entered by end user or HR. Use Fill Sub instead if filling a Leave Backfill position with a Substitute.
Inactivate Position	Use when a position is no longer part of your program.	FTE on this row will display as 0.0.	Action is available for use in the Vacant Positions section and as an action subsequent to a Return from Leave of Absence.
Leave of Absence	Use when an employee will go on a Leave of Absence. Indicate the amount of FTE an employee will remain working (0.0 if full Leave of Absence).	A Filled position row with a status of "Active" will be created to indicate the amount of FTE the employee will work, even if 0.00. A Filled position row with a status of "Leave" will be created, indicating the amount of FTE the employee is on Leave. A Leave Backfill vacancy is created in the Vacant Positions section for the amount of FTE the employee will not work.	All Leaves of Absence must be entered on the SMT.
Location Change	Use to move a filled or vacant position from one Location to another within the same Department. (Position remains same, only its location changes.) Enter the new Location ID in the location field.	A note will automatically be added to the Notepad with information about the location change. The row remaining at current location will have 0.0 FTE. The row at the new location will have the associated FTE.	Primarily for ESL/Special Ed/Special Programs and some Central offices.
Modify Position	Use to indicate a change in Work Year, FTE, Position Title or Attributes, or Funding for an employee or vacant position. To modify an assignment, enter or modify the editable fields on the Position Details page.	Updated Work Year, FTE, Position Title or Attributes, or Proposed Funding Distribution will display.	Cannot be used in place of employee Unassignment.  Check for correct endorsement(s) when appropriate.

Action	Definition	Result	Comments
Return from Leave	Use to return an employee whose employment status is Leave back into Active status.	Employee will return to former position and last identified funding.	Check that the correct Funding Group has been selected; change if necessary. Additional rows can be added as needed for further changes.
Transfer Out	Use to indicate an employee's transfer to a different Department / Location SMT combination.	Employee's FTE will display as 0.0 on this action row. This action will also automatically create a vacancy for the position the employee will no longer work. User is responsible for managing the vacancy.	
Transfer to Substitute	Use to indicate that a temporary employee is returning to the Substitute pool.	Employee's FTE will display as 0.0 on this action row. This action will also automatically create a vacancy for the position the employee will no longer work. User is responsible for managing the vacancy.	Employee will not be placed on another SMT. Employee is not ending employment with the district.
Transfer Within	Use to indicate an employee's transfer to another position within the same Department / Location SMT combination.	Employee's FTE will display as 0.0 on this action row. A vacancy must exist or be created in which to place the employee; make sure to Fill the employee in a vacant position. This action will also automatically create a vacancy for the position the employee will no longer work. User is responsible for managing the vacancy.	Check for correct endorsement(s) when appropriate.
Unassignment	Use to fully or partially unassign an employee from your site. Enter the amount of FTE the employee will continue to work at this Department/Location in the FTE field, from 0.0 to 0.999.	No vacancy will be created for this action.	HR will either place this employee in another position or the employee will be laid off.

<b>System-Generated Actions</b>			
<b>Action</b>	<b>Definition</b>	<b>Result</b>	<b>Comments</b>
Baseline	This is a system-generated action and is not available for selection.	Displays the filled or vacant position and funding information known in HR when staffing season begins.	This information is static and does not update automatically if changes occur after the SMT is loaded with data.
Leave Backfill	This is a system-generated action and is not available for selection.	This vacant position row is created as a result of an employee going on a Leave of Absence. Position information and vacant FTE that may need backfilling is displayed. User is responsible for managing the vacancy.	In most cases this vacant position will be Filled while the employee is on Leave. If not, place the vacancy in Hold status to retain the FTE for the returning employee. If the school year program will change and the FTE will be used elsewhere, Inactivate the position.
LOA – Working FTE	This is a system-generated action and is not available for selection.	Replaces the Leave of Absence action after the amount of working FTE is entered and the Active row is saved.	This action will only appear in the Filled Positions section.
Request New Position	This is a system-generated action and is not available for selection.	This action defaults in when you click the Request New Position icon.	You are required to enter the Work Year, FTE, Position Information and Funding Source. Funding Source defaults to General Fund, so be sure to select the correct source.
Request New Limited Term Position	This is a system-generated action and is not available for selection.	This action defaults in when you click the Request New Limited Term Position icon.	You are required to enter the Position Information and Funding Source.
Updated - New Baseline	This is a system-generated action and is not available for selection.	The most recent changes made on both the SMT and in PeopleSoft are displayed after a nightly automated rollup process occurs.	
Vacancy	This is a system-generated action and is not available for selection.	A Vacancy row is created when an employee Ends Employment, Transfers to a different position Within the same SMT or Transfers Out to a different SMT Department / Location combination.	