

Position – WMS – Inclusion Criteria

Purpose Use this procedure to establish *Inclusion Criteria* relationships for WMS positions. The inclusion criteria are needed for WMS Activity reporting as required by WAC 357-58-565.

Trigger Upon receipt of the WMS Position Evaluation Summary form from your agency’s WMS Coordinator (or HR Office), perform this procedure when assigning appropriate inclusion criteria for your Washington Management Service (WMS) positions.

Prerequisites

- Based on your organization’s WMS transition strategy and/or internal process, your agency WMS Coordinator has documented additions or revisions to inclusion criteria for WMS positions.

End User Roles In order to perform this transaction you must be assigned the following role:
Organizational Management Processor

Change History	
Date	Change Description
05/17/2011	New procedure created.
05/25/2011	Reviewed and approved by DOP Compensation Team.
03/25/2013	Updated screen shots. Provided list of new <i>Inclusion Criteria</i> . <i>Added note on creating a secondary inclusion.</i>










Menu Path Human Resources → Organizational Management → Expert Mode → Position

Transaction Code PO13

Helpful Hints	<ul style="list-style-type: none"> • Agency WMS Coordinators will document the appropriate inclusion criteria on the WMS Position Evaluation Form (or alternate form approved by DES). • Only two criteria may be listed in the system. If more than one criterion is listed, you may need clarity on which are the primary criteria and which is the secondary. • The WMS Inclusion Criteria, as specified in WAC has been included here as a reference. <p>In accordance with WAC 357-58-035, to be included in the Washington Management Service (WMS), a position must meet at least one of the following 5 inclusion criteria:</p> <ol style="list-style-type: none"> 1) Formulates statewide policy or directs the work of an agency or agency subdivision; 2) Administers one or more statewide policies or programs of an agency or agency subdivision; 3) Manages, administers, and controls a local branch office of an agency or an
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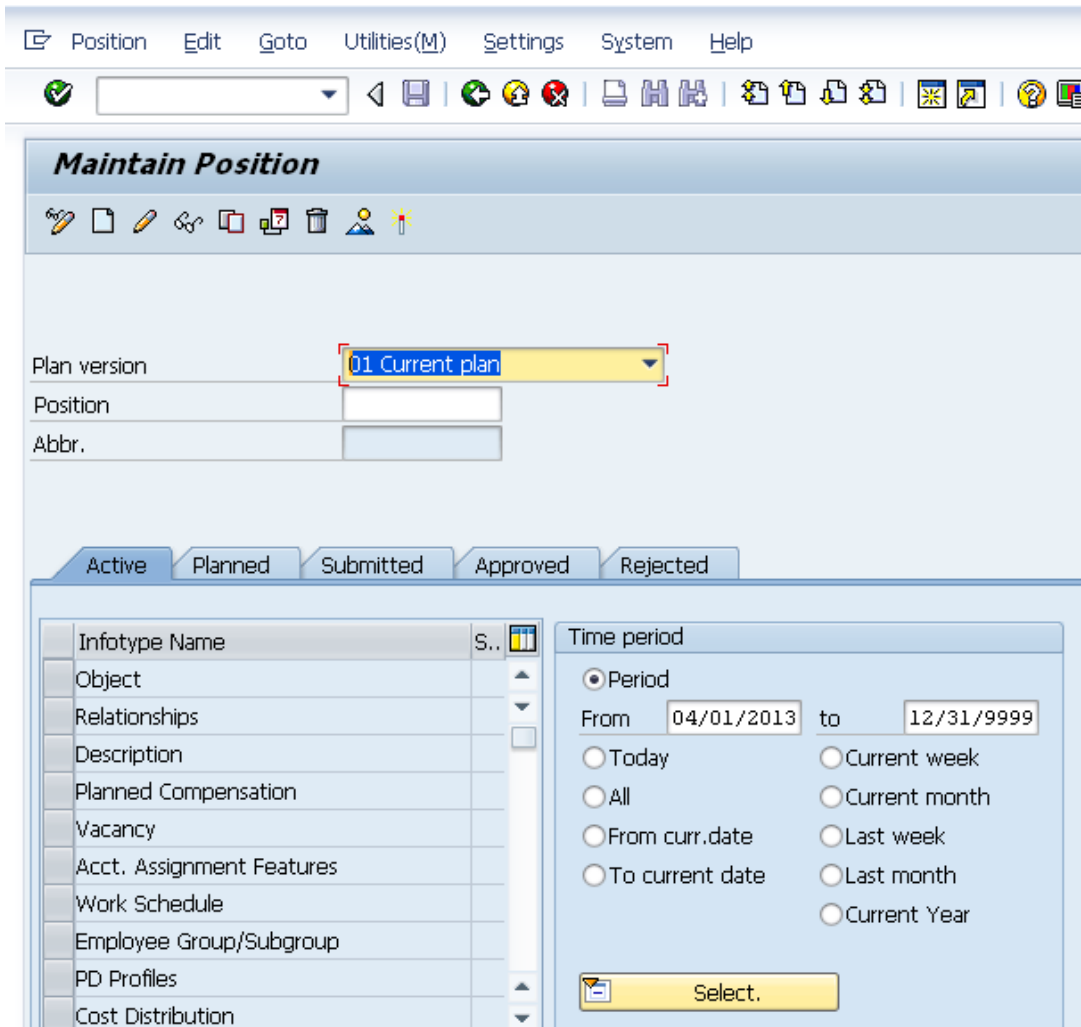
	<p>agency subdivision, including the physical, financial, or personnel resources;</p> <p>4) Has substantial responsibility in personnel administration, legislative relations, public information, or the preparation and administration of budgets; and/or</p> <p>5) Functions above the first level of supervision and exercises authority that is not merely routine or clerical in nature and requires the consistent use of independent judgment.</p>
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The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:


Message Type	Description
Error 	<p>Example:  Make an entry in all required fields.</p> <p>Action: Fix the problem(s) and then click  (Enter) to validate and proceed.</p>
Warning 	<p>Example:  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end.</p> <p>Action: If an action is required, perform the action. Otherwise, click  (Enter) to validate and proceed.</p>
Confirmation  or 	<p>Example:  Save your entries.</p> <p>Action: Perform the required action to proceed.</p>


Procedure

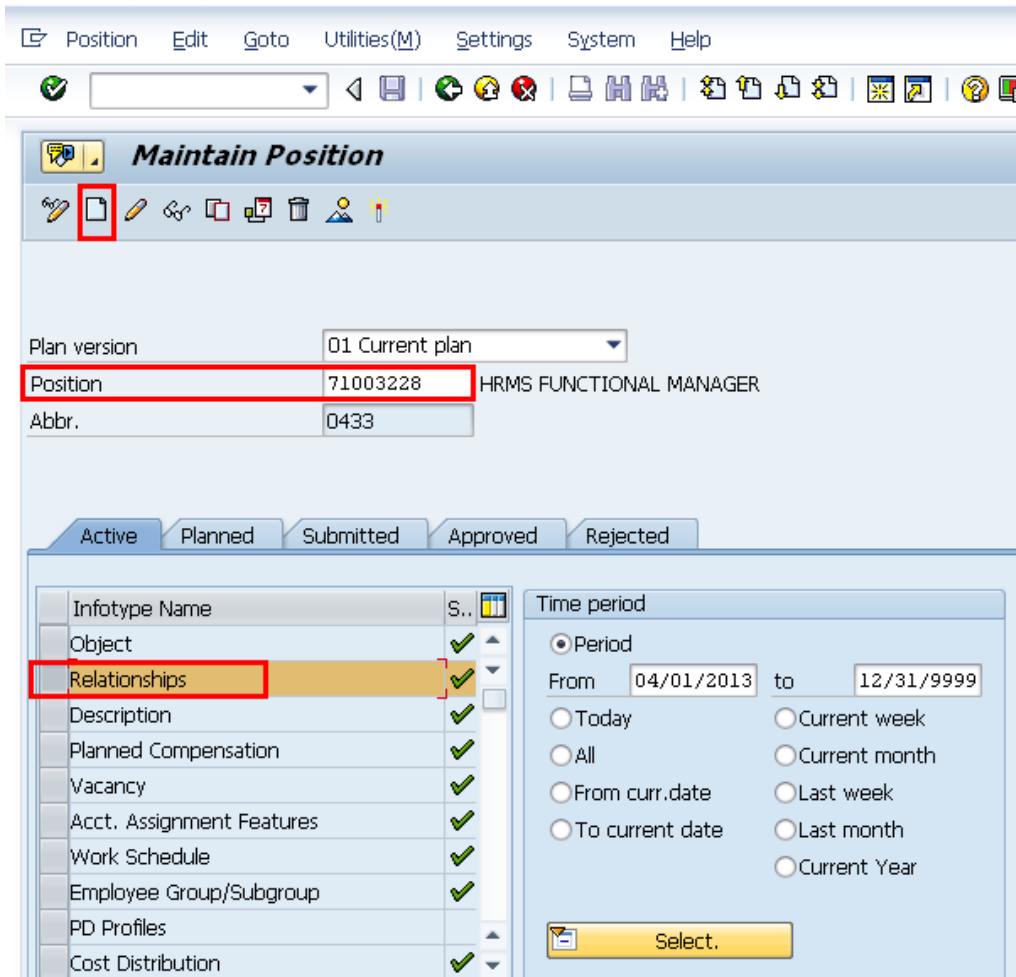
1. Start the transaction using the above menu path or transaction code **PO13**.



2. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Position	R	<p>This is a specific and concrete description of the responsibilities that one individual fulfills in an organization.</p> <p> State of Washington Position's object id number begins with a 7.</p> <p>Example: 71003228</p>

3. Click  (Enter) to validate the information.



Plan version: 01 Current plan

Position: 71003228 HRMS FUNCTIONAL MANAGER

Abbr.: 0433

Infotype Name	S..
Object	✓
Relationships	✓
Description	✓
Planned Compensation	✓
Vacancy	✓
Acct. Assignment Features	✓
Work Schedule	✓
Employee Group/Subgroup	✓
PD Profiles	✓
Cost Distribution	✓

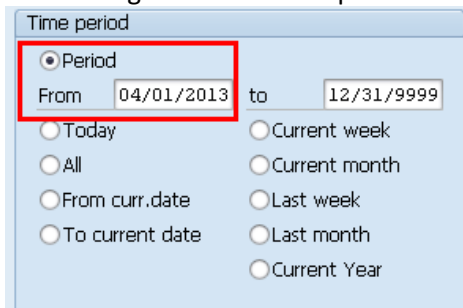
Time period

From: 04/01/2013 to: 12/31/9999

Options: Today, All, From curr.date, To current date, Current week, Current month, Last week, Last month, Current Year

Select.

4. In the Time period section, click Period and enter the **From** date as the effective date of the Market Segment relationship.



Time period

Period


From: 04/01/2013 to: 12/31/9999

Options: Today, All, From curr.date, To current date, Current week, Current month, Last week, Last month, Current Year


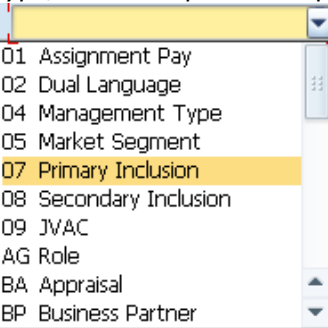



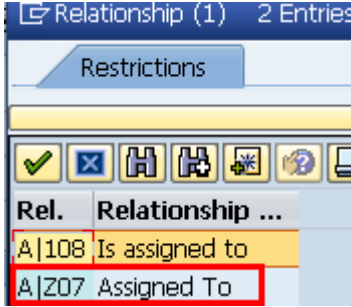

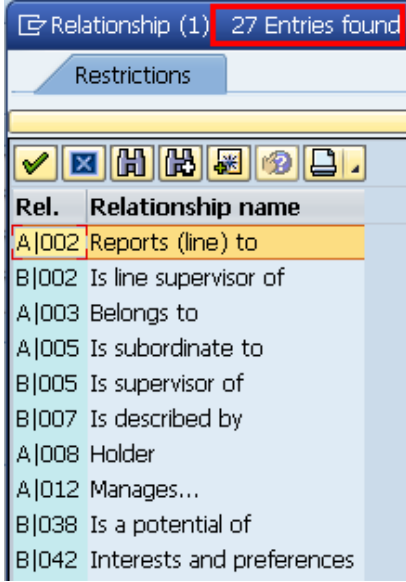
The date you use will be the **Inclusion Criteria Date** on HRMS reports.




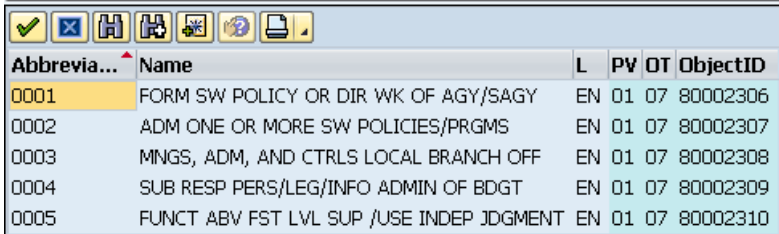
5. Click the box to the left of Relationships  to select.

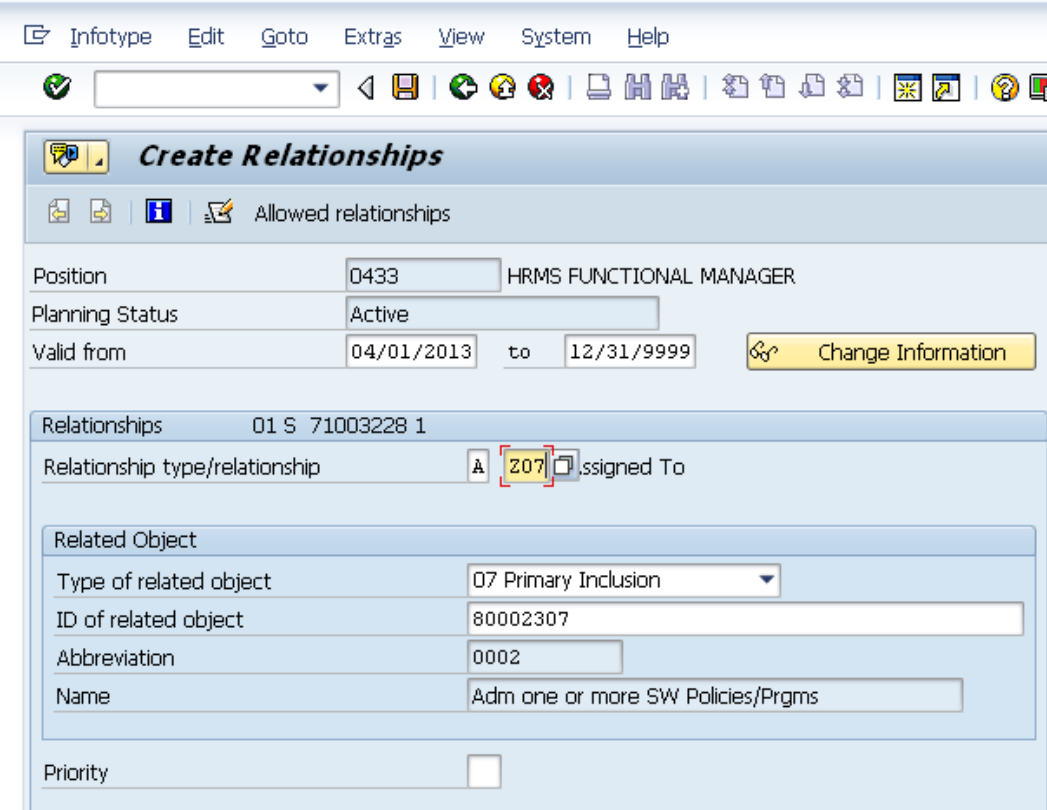
6. Click  (Create) to create a new record.


7. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Type of related object	R	<p>It defines if the related object is an organizational unit, a job, or a position, etc.</p> <p> By selecting the <i>Type of related object</i> first, the <i>Relationship type/relationship</i> field will provide the applicable option.</p>  <p>Example: 07 Primary Inclusion - This is the appropriate selection for this transaction.</p>

<p>Relationship type / relationship</p>	<p>R</p>	<p>This describes how two objects are linked together, such as a reporting relationship.</p> <p> Because the Type of Related object was selected first, only the applicable options will display for the Relationship type. Click on the matchcode and double click AZ07</p>  <p>Rel. Relationship ...</p> <table border="1"> <tr> <td>A 108</td> <td>Is assigned to</td> </tr> <tr> <td>A Z07</td> <td>Assigned To</td> </tr> </table> <p> If the Type of Related object is not selected first the below list of options will display:</p>  <p>Rel. Relationship name</p> <table border="1"> <tr> <td>A 002</td> <td>Reports (line) to</td> </tr> <tr> <td>B 002</td> <td>Is line supervisor of</td> </tr> <tr> <td>A 003</td> <td>Belongs to</td> </tr> <tr> <td>A 005</td> <td>Is subordinate to</td> </tr> <tr> <td>B 005</td> <td>Is supervisor of</td> </tr> <tr> <td>B 007</td> <td>Is described by</td> </tr> <tr> <td>A 008</td> <td>Holder</td> </tr> <tr> <td>A 012</td> <td>Manages...</td> </tr> <tr> <td>B 038</td> <td>Is a potential of</td> </tr> <tr> <td>B 042</td> <td>Interests and preferences</td> </tr> </table> <p>Example: A Z07 (assigned to) – This is the appropriate selection for this transaction.</p>	A 108	Is assigned to	A Z07	Assigned To	A 002	Reports (line) to	B 002	Is line supervisor of	A 003	Belongs to	A 005	Is subordinate to	B 005	Is supervisor of	B 007	Is described by	A 008	Holder	A 012	Manages...	B 038	Is a potential of	B 042	Interests and preferences
A 108	Is assigned to																									
A Z07	Assigned To																									
A 002	Reports (line) to																									
B 002	Is line supervisor of																									
A 003	Belongs to																									
A 005	Is subordinate to																									
B 005	Is supervisor of																									
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A 008	Holder																									
A 012	Manages...																									
B 038	Is a potential of																									
B 042	Interests and preferences																									

<p>ID of Related Object</p>	<p>R</p>	<p>This is the system-assigned number of the associated object to which the original object is related.</p> <p> Click the  (Matchcode) to open the selection list and click  (Start Search).</p>  <p>Example: 80002307</p>
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8. Click  (Enter) to validate the information.

9. Click  (Save) to save.



To add a **Secondary Inclusion**, repeat steps 6-9, selecting **Secondary Inclusion** as the Type of related object. The Relationship type / Relationship for the Secondary Inclusion will be the **AZ08**

Related Object	
Type of related object	08 Secondary Inclusion

Create Relationships

Allowed relationships

Position: 0433 HRMS FUNCTIONAL MANAGER

Planning Status: Active

Valid from: 04/01/2013 to 12/31/9999 Change Information

Relationships: 01 S 71003228 1

Relationship type/relationship	A	208	Assigned To
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Related Object

Type of related object	08 Secondary Inclusion
ID of related object	80003638
Abbreviation	0002
Name	Adm one or more SW Policies/Prgms
Priority	<input type="checkbox"/>

10. You have completed this transaction.

Results
You have created an Inclusion Criteria relationship to the WMS position.
Comments
None.