



Agency Consolidation Mass Default Chargeline

quick reference guide

Agency Preparation & Data Collection

Before technical updates can begin, agencies must define the scope of the impact and prepare the template.

Position & Employee Identification:

1. **Identify Impact:** Identify all employees affected by the consolidation.
2. **Determine Position Status:** Evaluate whether employees are maintaining their current position or will be assigned a new position.
3. **HR Coordination:** Work closely with HR to create any necessary new positions or to officially reassign employees.

Using the LDPR Update Template:

Instructions for the template are available on the **Instructions Tab** within the template file for easy reference.

1. **Setup:** Make a copy of this [LDPR Update Template](#) and rename the tab to be specific to your agency.
2. **Old Position Information (Columns A-Q):**
 - a. **Small Batches (10 or fewer):** Use the [Employee Default LDPR QRG](#) to identify the Position ID and fill out column B of the template.
 - b. **Group/Mass Updates:** If consistent updates are being made to a specific group, input the elements to be changed and use four asterisks (****) on other fields to indicate those fields remain unchanged (e.g., Dept 150, Unit 0410, Appr ****).
 - c. **Large Batches (More than 10):** Contact Anson Owens (ansonowens@utah.gov) for assistance in generating a list of employee positions and chargelines to populate the template.
3. **Populate New Coding (Columns M-X):** Complete the New Coding sections of the template to reflect the correct LDPR updates for each individual or group.
4. **Define Timeline:** Establish the formal **Effective Date** for the consolidation (column AJ).

Once the template is filled out, email it to Anson Owens (ansonowens@utah.gov).

System Processing (Finance Support)

Once the data is submitted, the following steps are performed by Finance Support to prepare the system:

1. **Requirement Analysis:** The updated template is used to determine which new LDPRs must be built, and those that require modification.
2. **ID Mapping:** A list of LDPRs that will receive new identification numbers is compiled.
3. **File Generation:** An LDPM update/creation file is generated based on the agency's template details.
4. **Draft Upload:** The upload file is submitted, placing all transactions into a **Draft** status in Vantage.
5. **Agency Notification:** Agencies will be provided with a compiled list of **LDPM Transaction IDs** and updated LDPR numbers for validation.

Agency Validation & Submission

Agencies must manually **verify and submit** the draft transactions to make the new chargelines **live**.

LDPM Testing:

1. **Locate Transaction:** Navigate to the **LDPM Page** and search using the **Transaction ID** provided on Finance Support's agency report.

The screenshot displays the Vantage HRM Transaction interface. At the top, the 'Vantage' logo and 'LDPM' tab are visible, with a red circle and number '1' highlighting the 'LDPM' tab. Below the header, the 'HRM Transaction' title is shown. A search section contains several input fields: 'Code' (with 'LDPM' entered), 'Transaction ID' (with 'TEST123456789' entered and a red circle and number '2' highlighting it), 'Transaction Dept', 'Transaction Unit', 'Phase', and 'Status'. A 'Show More' link is present below the search fields. At the bottom, a table displays transaction data with columns for Code, Transaction Dept, Transaction Unit, Transaction ID, Phase, and Status. The first row shows 'LDPM', '100', a blank Transaction Unit, 'TEST123456789' (highlighted with a red circle and number '3'), 'Draft', and 'Hold'.

Code	Transaction Dept	Transaction Unit	Transaction ID	Phase	Status
LDPM	100		TEST123456789	Draft	Hold

2. Verify Dates & Depts: On the **Labor Distribution Profile tab**, ensure the **From Date** aligns with the consolidation date and the **Home Department/LDPR** match the new chargeline info provided from Finance Support.

Labor Distribution Profile Management (LDPM) ☆ | Draft | [Grid Icon]

Department: 150 | Unit: - | Transaction ID: TEST1234567689 | Version: 1

The screenshot shows the 'Labor Distribution Profile' tab selected. Below the header, there is a metadata bar: 'Created By: 235474 | Created On: 04/27/2026 | Modified By: 235474 | Modified On: 04/27/2026'. The main content area displays the following details:

From 07/01/2026	To 12/31/9999	Labor Distribution Profile 12345	Short Description Test1234
Home Department 150 GOV OPS			
Long Description Test1234			

3. Audit Coding Details: Click into the **Labor Distribution Profile Detail tab** and select **Expand** on each line. Validate that the coding is correct for the related employees' new chargeline.

Note on Splits: If the default accounting is split across multiple chargelines, validate the distribution percentage. Distribution percentage is a decimal percent (i.e., a 50/50 split would have 0.5 on each line) and must add up to 1 for the transaction to validate.

Labor Distribution Profile Management (LDPM) ☆ | Draft | [Grid Icon]

Department: 150 | Unit: - | Transaction ID: TEST1234567689 | Version: 1

The screenshot shows the 'Labor Distribution Profile Detail (1)' tab selected. Below the header, there is a metadata bar: 'Home Department: 150 | Home Department Short Description: GOV OPS | Labor Distribution Profile: 12345'. The main content area displays a table with 1 record:

Line Number	Department	*Distribution Percent	From	To
1	150	.5	07/01/2026	12/31/9999

Below the table, the 'COA' (Chart of Accounts) details are shown:

Fund 1000	Sub Fund
Appr Unit FHGAA	
Unit 0411	Sub Unit
Object	Sub Object
Activity	Sub Activity

4. Finalize: Once confirmed, **Validate** and **Submit** the transaction.

Note: The LDPR is only available for use once the LDPM transaction is officially **SUBMITTED**.

Labor Distribution Profile Management (LDPM) ☆ Draft

Department: 150 | Unit: - | Transaction ID: TEST1234567689 | Version: 1

Home: Department: 150 | Home: Department Short Description: GOV OPS | Labor Distribution Profile: 12345

1 - 1 of 1 Records

Line Number	Department	*Distribution Percent	From	To
1	150	.5	07/01/2026	12/31/9999

HR Coordination:

Once the financial transactions are live, the final link to the employee record must be updated in the HR system.

- **When to Update:** This step is only required for employees whose LDPR number has changed (i.e., the previous LDPR number could not be reused for the new consolidation requirements).
- **Notify HR:** Provide HR with the specific list of positions requiring updates and the new LDPR numbers (provided in the details from Finance Support).
- **Requirement:** Ensure all LDPM transactions are submitted before requesting HR updates.