Best Practices: Set up new and transfer employee positions for success [1]

July 19, 2021 by Employee Services [2]

When preparing positions for new employees or transfers, consider these tips for smooth setup and successful fall payroll.

Tips to keep in mind when creating a position:

- Use an effective date for the NEW position row sometime before the actual effective date of the hire. By doing this, additional rows with a new effective date can be added in case of last-minute changes.
- Complete the HRGL Request for funding with the same effective date as the NEW position row. It will post once the position is APPROVED.
- The effective date of the position’s first APPROVED row must match the first effective date in the Department Budget Table (DBT).
- If a NEW position is DENIED, the original HRGL Request will not post. Create a separate CU Funding Entry with the effective date of the first APPROVED row (the one added after the DENIED row) so that a DBT entry can be created.
- Using correction to change NEW position row dates may cause future HRGL Requests to fail.
- If creating a new position or changing the position’s department effective before 7/1, funding is created for your new position using the position HRGL Request. Use the CU Funding Entry to create a funding row effective 7/1/21 to continue funding into the new fiscal year.

Verify vacant position funding

There are several ways to verify the correct position funding details through HCM WorkCenter.

- The Position Information query will return all active, inactive and vacant positions in your unit with links to funding, history and incumbents.
- The Position Funding query will return the current funding distributions for all positions in your unit including headcounts.
- Funding History displays all the current and former funding rows.
- Use the CU Funding Entry to update funding for vacant positions with any effective date during the vacant period. When an incumbent exists, funding may only be updated
for current and future payroll periods.

**Changing a position’s department**

There are a few extra tips to follow when it’s necessary to change the department to which a position is assigned.

- Funding is created for the new department using the position HRGL Request feature.
- After the position row is approved, use the **CU Position Funding History** in HCM WorkCenter to confirm that it posted to the new department.

**Final tasks**

Once (re)hires are complete, check that everyone made it to the roster:

- Check the **Personnel Roster** to ensure all newly hired or transferred employees posted correctly, including position data.
- Missing someone? Use the **Job List query** to confirm an employee from another department.
- Compare the roster data to results from the **Funding Distribution query** to ensure funding exists, is active and reflects current effort for each incumbent.

**Need extra help?**

To access the HCM queries mentioned above:

- Log into the **employee portal**.
- Open the **CU Resources** dropdown menu and click Business Tools.
- Select the **HCM tile** and choose **HCM Community Users** from the drop-down menu.
- Click the **HCM WorkCenter tile**.
- Select the **Resources** tab and click the query you desire.

You can find HR/GL resources on the **HCM Funding Entry page**.

As always, you can email hcm-community@cu.edu or System.HRGL.Team@cu.edu for additional help.

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