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** [3].
- 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 [4].

As always, you can email hcm-community@cu.edu [5] or System.HRGL.Team@cu.edu [6] for additional help.

Position Funding [7], Position Queries [8], payroll [9], HRGL [10], Funding Entry [11], funding [12], Funding Suspense [13]
Display Title:
Best Practices: Set up new and transfer employee positions for success
Send email when Published:
No

Source URL:https://www.cu.edu/blog/hcm-community/best-practices-set-new-and-transfer-employee-positions-success

Links
[1] https://www.cu.edu/blog/hcm-community/best-practices-set-new-and-transfer-employee-positions-success [2] https://www.cu.edu/blog/hcm-community/author/34887 [3] https://my.cu.edu/
[4] https://www.cu.edu/hcm-community/enter-funding-changes-department-budget-tables
[5] mailto:hcm-community@cu.edu [6] mailto:System.HRGL.Team@cu.edu [7] https://www.cu.edu/blog/hcm-community/tag/position-funding [8] https://www.cu.edu/blog/hcm-community/tag/position-queries

[9] https://www.cu.edu/blog/hcm-community/tag/payroll [10] https://www.cu.edu/blog/hcm-community/tag/hrgl [11] https://www.cu.edu/blog/hcm-community/tag/funding-entry
[12] https://www.cu.edu/blog/hcm-community/tag/funding [13] https://www.cu.edu/blog/hcm-community/tag/funding-suspense