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

Verify position data and funding for existing positions:

- Deciding whether to use an existing position or create a new position? Review your department positions with the following queries:
  - 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 vacant and filled positions in your unit including headcounts.
  - **Funding History** displays all the current and former funding rows.

Tips to keep in mind when creating a NEW position:

- Only one row of position data may be added with the same effective date, i.e., position data does not allow effective date sequencing. As possible, when creating a NEW position, anticipate future changes before a hire/transfer by using an effective date for the NEW position row sometime before the effective date of the hire. This way, additional rows with a new effective date can be added in case of last-minute changes.
- Create a new position instead of trying to repurpose an existing position. Repurposing a position can cause downstream effects if wanting to use the position to create a Non-Person Profile for recruitment. The Profile Type on the Non-Person Profile is defaulted by the position number and identified by employment group from position information.

For example, if the position was originally created as a faculty position, but the need for the position is now for University Staff, the Profile Type on the Non-Person is not editable and cannot be changed, so it is best to create a new position.
- Each campus has different funding rules (i.e., how taxes and deductions post and how encumbrances are calculated). The Business Unit field determines which campus funding rules will be followed.
The effective date of the position’s first APPROVED row must match the effective date of the first row of the Department Budget Table (DBT) (where position funding is stored).
After clicking SAVE in position, complete the HRGL Request for funding with the same effective date as the NEW position row. Then click SAVE/SUBMIT. Ensure this step is completed correctly.
Click SUBMIT after returning to position data, and funding will post once the position row is APPROVED.
After the position row is approved, use the CU Position Funding History page from the HCM WorkCenter to confirm that it posted correctly.

Tips to keep in mind when a NEW row is DENIED:

- 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 can be created.
- After the additional position row is approved, use the CU Position Funding History page from the HCM WorkCenter to confirm that it posted correctly.

Tips for changing a position’s department:

- Add a DPC row to the position.
- The new department row must also update job data if there is an incumbent. Ensure that the incumbent check box is checked before clicking SAVE.
- After clicking SAVE in position, complete the HRGL Request for funding with the same effective date as the department change. Then click SAVE/SUBMIT. Ensure this step is completed correctly.
- Click SUBMIT after returning to position data, and funding will post once the position row is APPROVED.
- After the position row is approved, use the CU Position Funding History page from the HCM WorkCenter to confirm that it posted correctly.

Update vacant position funding:

- Use the CU Funding Entry query to update funding for vacant positions with any effective date during the vacant period.
- Once a position has an incumbent, funding may only be updated for current and future payroll periods.
- After the position row is approved, use the CU Position Funding History page in HCM WorkCenter to confirm that funding posted correctly.

Funding a position across fiscal years

- When creating a new position or changing the position’s department after July 1 with an effective date before July 1, funding is created for your new position using the position HRGL Request before July 1.
- Use the CU Funding Entry query to create an additional funding row effective July 1st to continue funding into the new fiscal year.
- After the position row is approved, use the CU Position Funding History page in HCM
WorkCenter to confirm that funding posted correctly in both fiscal years.

Tips to keep in mind when using a correction:

- Changing position data with correction often has unintended consequences.
- Never use correction to change data on a NEW position row. If different data is needed, deny the row and enter a row with the appropriate data, or start over with a new entry. Corrections can cause the position row to fail in workflow and get “stuck.” System intervention is required to update position status.
- Matching department data between position, job data and the department budget table is required for funding to process correctly. Never use correction to change the department in a position.
- If funding must be changed, create a new funding row with a CU Funding Entry form. Correction mode is never used to change data in the DBT.

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

- Best practice recommends one employee per position. Using the same position for multiple employees can be problematic.
- **Do not use the same position on multiple employee records for the same employee or it will cause an error in FIN.**
- Check the Personnel Roster query to ensure all newly hired or transferred employees have correct position and job data.
- Missing a transferred employee? Use the Job List query to confirm data for an employee from another department.
- Compare the roster data to the Funding Distribution query to ensure funding exists for all incumbents exists and is active and reflects current effort for each incumbent.
- **Tip:** When uploading department timesheets, compare a current roster to an earlier roster to ensure that any terminations are included in the payroll uploads.

Need extra help?

You can find HR/GL resources on the HCM Funding Entry page [3].

As always, you can email hcm_community@cu.edu [4] or System.HRGL.Team@cu.edu [5] for additional help.

To access the HCM queries mentioned above:

1. Log in to the employee portal [6].
2. Open the CU Resources dropdown menu and click Business Tools.
3. Select the HCM tile and choose HCM Community Users from the drop-down menu.
4. Click the HCM WorkCenter tile.
5. Select the Resources tab and click the query you desire.

HRGL [7], Position Funding [8], Position Queries [9], funding [10], Funding Suspense [11], Funding Entry [12], payroll [13]