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Best practices: Setting up positions for new employees and transfers [1]

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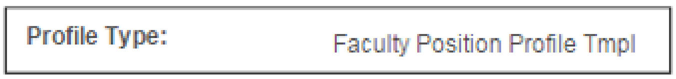
When preparing positions for new employees or transfers, consider these tips for smooth setup and successful fall payroll.

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.
- The **Funding History** query 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, as position data does not allow effective date sequencing. If 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 the position is eventually used 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 the 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 Department Change (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** page from the HCM WorkCenter 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 from the 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** (new fiscal year) with an effective date **before July 1** (prior fiscal year), the funding is created for the new position using the position HRGL Request before July 1 (prior fiscal year).
- Use the **CU Funding Entry** page from the HCM WorkCenter to create an additional

funding row effective July 1 of the current year to continue funding into the new fiscal year.
- After the position row is approved, use the **CU Position Funding History** page from the 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, the row can be denied through the approval process and a row can be entered 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 will be 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 Department Budget Table (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.

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