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Review best practices for preparing positions this fall [1]

July 24, 2020 by Employee Services [2]

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

Run three HCM Resources queries to find existing positions and funding:

- **Position Information** query will find all active or inactive positions in your unit.
- **Position Funding** query will find all the current funding distributions for all positions in your unit.
- For each employee listed in the Personnel Roster, ensure the **Funding Distribution** query reflects their current and correct funding.

Keep these tips in mind when creating a position:

- Use an effective date for the NEW position row sometime before the actual effective date of the hire so additional rows with a new effective date to make last minute changes.
- The effective date of the first APPROVED row of the position must match the first effective date of the Department Budget Table (DBT).
    - Complete the HRGL Request for funding with the same effective date as the NEW position row. It will post once the position is **APPROVED.**
    - If a NEW position is **DENIED**, the original HRGL Request will not post. Create a new 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.
    - Do not use correction to change NEW position row dates. It could cause future HRGL Requests to fail.
- If the NEW position effective date is BEFORE 7/1/20, create the HRGL Request with the same effective date as the NEW row. Then, create a CU Funding Entry to create funding effective 7/1/2020. Without funding dated 7/1/20, FY21 payroll will go to suspense.

When hiring into a current position:

- Funding may be updated for vacant positions with any effective date during the vacant period.
- Funding for positions with an incumbent may be updated for current payroll periods and beyond. Always confirm the current funding, and update if needed.
- A Payroll Expense Transfer records funding changes after payroll.

When changing the position’s department:

- A new HRGL Request is required with the same effective date as for position department change.
- If the same funding for a position existed in a different department as CU Funding Entry in the new department, the same funding will not post. Add a funding end date to allow the entry to post.

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