

Set up positions for new employees and transfers with these important tips ^[1]



July 15, 2022 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 so that additional rows with new effective dates 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 of 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 can be created.
- Using correction to change NEW position row dates and other data may cause future HRGL Requests to fail and may interfere with status changes.
- When creating a new position or changing the position's department effective date before July 1, funding is created for your new position using the position HRGL Request. Use the **CU Funding Entry** to create a funding row effective July 1, 2022 to continue funding into the new fiscal year.
- After the position row is approved, use the **CU Position Funding History** from the HCM WorkCenter to confirm that funding posted correctly.

Verify vacant position funding:

- 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.

- Use the **CU Funding Entry** 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** from the HCM WorkCenter to confirm that funding posted correctly.

When changing a position's department:

- Add a DPC row to the position.
- Use the same effective date to create funding for the new department using the position HRGL Request feature. It will post once the position is approved.
- After the position row is approved, use the **CU Position Funding History** from the HCM WorkCenter to confirm that it posted to the new department.

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

- Check the **Personnel Roster** (an HCM query) 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 the **Funding Distribution** query to ensure funding exists for all incumbents, is active, and reflects current effort for each incumbent.

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 into 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], [funding](#) [9]

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