Summary of Upgrade Changes: Position & Appointment (as of 4/16/15)

- CSE is not using the central Position Management Request (PMR) form. We will continue to use the Google form, but it will be used for new position requests only. Requests for modifications to existing positions should be done via the HRTS3 form.
- We will be able to submit position requests with effective dates no greater than 30 days in the future.
- Central is changing their estimated turnaround time on position requests from 24 hours to 24-48 hours.
- Employees cannot report to a vacant position. If an employee leaves, you will need to request a change in the reports-to for all employees reporting to that position. You would then request to change it back when a new person is in the vacant position.
- When submitting an HRTS3 for position modifications for a pooled position, departments will need to indicate if the change applies to all incumbents of that position or just to a particular individual.
- We are allowed to have two people in one position when it is due to an overlap of staffing. For example, if one person gives notice and a replacement starts two weeks before the employee leaves, they can share that position. However, any timesheets and absence requests that the employee would need to approve will route to an error report since the system wouldn’t know which employee to send the request to.
- Action/reason rows dated more than 30 days in the future will not be allowed. The new “Expected End Date” field will be use as a placeholder date. This field also drives encumbrances and graduate assistant tuition benefits. The payroll cluster will run queries against this field to see what appointments are anticipated to end within the next 30 days. They will automatically enter the spring SWB row for 9-month faculty as well as the semester dates for graduate assistants. They will contact departments about all other appointments to see if an end date should be entered or if the appointment is being extended.
- Job entry deadline will be noon on the Wednesday following the end of the pay period (e.g., 5/6/15 for the pay period ending 5/3/15). The paysheet update deadline will be 10am on the Friday following the end of the pay period (e.g., 5/8/15 for the pay period ending 5/3/15).
- Distribution entry is no longer tied to an appointment. If a distribution is entered on the HRTS3, the payroll cluster will attempt to enter the distribution. If the combo code is not set up or if there is no distribution information on the HRTS3, the payroll cluster will notify the department of this. It will then be up to the department to enter the distribution.
- Abstracts will be available for printing by anyone with any of the follow access roles:
  - Appointment entry
  - Appointment inquiry
  - Position entry
  - Unit recruiter
  - Distribution entry
  - Retro distribution entry
- Leaves over 10 days (including FMLA, sabbaticals, and SSLs) will need to be in job data and absence management. The cluster will enter both pieces since it is critical that the entries happen on the same day.
• Faculty summer appointments will be calculated the same way but will look very different in the system.
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• Job aids available on the upgrade website:
  o Creating New Positions
  o Pooled Positions
  o Position Pages Field Names and Definitions
  o Full Time Equivalent (FTE) Calculations
  o Position Management Approval
  o Updating Existing Positions
  o Updating Existing Positions Reason Codes
  o Additional Pay Field Names and Definitions
  o Additional Pay Instructions
  o Rate Codes on Job Data: Compensation
  o Absence Eligibility Groups
  o Appointment Entry: Hire High Level Checklist
  o Appointment Entry: Hire Field Names and Definitions
  o Appointment Entry: Step by Step
  o Calculating the Progression Anniversary Date
  o Empl Class
  o Summer Appointments in HRMS
  o Using Smart HR for Temp/Casual or Student Hires
  o What Happened to Appointment Type and Term
  o Contract Field Names and Definitions
  o Entering Contract Details
  o Tenure and Continuous Data
  o Tenure Field Names and Definitions
  o Overview of Leaves of Absence
  o Phased Retirement
  o Sabbatical Leaves
  o Work Study Placement
  o HRMS Citizenship/Visa Data
  o Add a Person/Person of Interest
  o Add a Person/Person of Interest Field Names and Definitions
  o Assigning Affiliate Relationships