Preparing Position and Assignments for the Conversion to PeopleSoft

The following Preparation Activities must be completed by administrative staffs who are the primary HRMS users for their department.

Important Dates

- August 12 – September 11 - Create additional positions
- August 26 – September 13 - Route Fall assignments to HR
- August 26 – August 30 – Create and route Returning benefits eligible EE assignments
- August 26 – September 18 – Create and route New benefits eligible EE assignments
- August 26 – September 13 – Create and route Non-benefits eligible assignments:
- By September 30th – End un-wanted positions

Preparation Activities

- Position Creation – STUDENT ASSIGNMENTS
  Each student assignment with an effective date of 9/1/2013 must be assigned to a single position. Students will no longer be able to share a position.

  Student Assistants, i.e. work-studies, must be in a pooled position. If a work-study is assigned to a non-pooled position, the document won’t route to Financial Aid. Even though work-studies will be in a pooled position, there should only be ONE work-study per position at a time.

  **Action Item**: Create pooled Student Assistant (work-study) positions for each work-study starting 9/1/2013 or later.

  All other Student Assignments (GRAs, TAs, Student Clerks, etc.) must be in a non-pooled position

  **Action Item**: Create non-pooled positions for all non-work-study student titles

- Position Clean-Up – ALL ASSIGNMENTS

  **Hours Per Week**
  There cannot be differences between the hours per week of the position and the hours per week (percent time) on the assignment in PeopleSoft. Therefore, the hours of the position need to match the hours of the assignment. FTE/Hours per week values impact benefits eligibility and compensation rate calculations.

  **Action Item**: Ensure position hours and assignment hours are identical upon assigning the employee.

  **Un-used/Un-wanted Positions**
  To prepare for the conversion to PeopleSoft, positions that are un-used and un-wanted should not carry over to PeopleSoft, therefore positions that are un-used and un-wanted need to be ended in HRMS.

  **Action Item**: Un-used and un-wanted positions need to be ended by adding an end date to the position. Positions should be ended no later than 9/30/2013.
Owning Unit
Owning unit needs to be validated to ensure proper translation to PeopleSoft DEPTIDs at conversion. The DEFINE unit code is now called Department ID (DEPTID).
- This code notes which positions are owned by their respective departments.
- PeopleSoft security will use this field to enforce who can maintain/fill each position.
- The crosswalk translation of unit codes to DEPTID will be published to enable departments to fully understand the go-forward organizational hierarchy.
- Example, departments with ‘PI’ will be rolled up.

**Action Item:** Validate and correct owning units for all positions in HRMS. To correct the owning unit, you will need to modify the position; this will cause a document to be created and routed for approval.

Reports To
“Reports to” is an important attribute of the position in PeopleSoft HCM. “Primary Reports to” data needs to be corrected to be the employee’s direct supervisor, not the department head to ensure proper translation in the PeopleSoft conversion.
- This field enables Manager Self Service to properly filter employees so that a supervisor can only view the employees he/she is actually responsible for in addition to enabling workflow routing of approvals.
- Accurate “reports to” is critical when supervisors:
  - must approve absences and time reports.
  - manage employee data.
  - delegate management of employee data to administrative and clerical staff.

**Action Item:** Review all positions in HRMS to ensure “Primary Reports To” is entered and correct. If the “Reports To” is missing or incorrect, the position will have to be updated to reflect the correct Reports To. Making a change to the Reports To is a “straight update” and will not require a document to be created or routed.

Funding
Valid funding account numbers are needed in DEFINE to ensure that positions are assigned the correct funding codes in PeopleSoft.
- Account numbers will be called combination codes on the PeopleSoft funding page.
- Positions will be funded on a screen called the Department Budget Table.
- Cleaning funding up now will minimize data that must be cleaned up post go-live.

No position should be unfunded or underfunded beginning 9/1/13. Departments should use a department account if no other funding exists to ensure accurate conversion. Since no pay is generated, no distributions will occur against these accounts.

**Action Item:** Validate all positions to ensure valid and accurate funding is present through 8/31/2014 unless grant funded, even if vacant. If funding is not accurate or missing, the position must be modified in order to add/change funding.
Other Position Attributes
The following location details need to be validated/updated (use department data if no employee-specific data exists):

- Building
- Phone number
- Mail code

Quality of location data is important so these data elements are converted correctly to PeopleSoft values.

**Action Item:** Validate building code, phone number, and mail codes on all positions and correct attributes if need be. Building code, phone number and mail code corrects are also “straight updates”, which do not require document creation.