



# FULL POSITION MANAGEMENT

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# Big Picture



All appointments will have positions.

Currently in Positions	Employee Types being moved into Positions
SHRA Permanent, Temporary, Students EHRA Permanent, Temporary	Faculty Members Post Docs EHRA Graduate Students Secondary Appointments

# Why and Why Now?



- Those managing finances at the Board of Trustees and at the University System level think in terms of positions when they discuss budgets. As a result, the University has to translate our appointments (which don't have positions) into positions.
- Translating this data is an unstable process, and it gets increasingly complex as the System Office requests more data.
- This translated data exists as a point in time, and campus HR and Finance leadership can't adjust it before it is sent.

# Why and Why Now? (continued)



- Having all faculty, staff, and student employees in positions will facilitate the next budget planning cycle, plus will improve transparency of the information being sent to the System Office.
- It also brings benefits like:
  - being able to track positions even if there is no incumbent.
  - attributes like Campus Security Authority can be set by position so they don't have to be set by person.
  - we can retain organizational rollups even if positions are empty.

# Planning for Go-Live



- ConnectCarolina will be unavailable from 5:00 pm on Friday, Oct. 8, through 5:00 pm Sunday, Oct. 10.
- Over the weekend, positions and reporting relationships will be created for all active employees not in positions.
- Planned budget amounts will be created for those positions. For primary jobs, the amount will be the current incumbent's salary, and for secondary jobs, it will be any supplemental pay converted to an annual amount.

# OCTOBER 2021

Sun	Mon	Tues	Weds	Thurs	Fri	Sat
3	4	5	6 Deadline to Submit ePARs  All Data Clean-Up Tasks DUE	7  Deadline to Approve ePARs	8  <u>ePAR Freeze Begins</u>  In-flight ePARs Cancelled	9  Conversion Weekend  <i>CC Unavailable</i>
<p><b>Expired Expected End Date Clean-Up</b> 1 Action: Extend End Dates -or- Term if no longer active</p>			<p><b>Continue Holding 10/1 EFFDT Actions until after Go-Live (with few exceptions)</b></p>			
10  Conversion Weekend  <i>CC Unavailable</i>	11  <b>FPM Go-Live!</b>  <u>ePAR Freeze Lifted</u>  Green Light: 10/1 EFFDT Actions	12	13	14	15	16
		<p><b>Expired Expected End Date Clean-Up</b> 2 Actions: 1-Extend End Dates &amp; 2-Move EEs into Positions -or- Term if no longer active</p>				
17	18	19	20  M04 Lock-Out	21	22	23
<p><b>Expired Expected End Date Clean-Up</b> 2 Actions: 1-Extend End Dates &amp; 2-Move EEs into Positions -or- Term if no longer active</p>						
24	25	26  M04 Confirm	27	28	29	30
			<p><b>Expired Expected End Date Clean-Up</b> EEs paid will go to suspense 3 Actions: 1-PAATs to move distribution, 2-ePAR to Extend &amp; 3-Move into Position before M05 -or- Term if no longer active</p>			

# Dates to watch - HR Actions



## Effective date before October 1

- ✓ Transfer (all except Temp to Perm)
- ✓ Edit Existing Job
- ✓ Change Employment Status – Leave and Return from Leave
- ✓ Add Position (all except New Hires and Temp to Perm)
- ✓ Change Existing Position
- ✓ Inactivate Position

## Effective date before October 13

- ✓ New Hire/Rehire\*
- ✓ Transfer - Temp to Perm only\*
- ✓ Add/Update Position (for New Hires and Temp to Perm only)\*
- ✓ Change Employment Status – Terminations, Layoffs, Suspensions

\* Actions with an effective date between Oct 1, 2021 and Oct 12, 2021 require a position

\* New Positions should be effective Sept 30, 2021 for all new hires on or after Oct 1st

# Holding HR Actions



## Business as Usual

- ✓ Fund Swaps (Position and Appointments)
- ✓ Lump Sum Payments
- ✓ Affiliates





# What's Changing

# Creating a Posting in PeopleAdmin



- **Positions will need to be created or updated** before posting for all employee types, including faculty. Will flag which positions to be sent to PeopleAdmin for recruiting.
- **PeopleAdmin changes:**
  - **SHRA Permanent and Faculty Permanent** positions will work the same way EHRA Non-Faculty positions work now - **position description data is read-only.**
  - **SHRA Temporary, Faculty Temporary, and Post-Docs** – position data will be fed from ConnectCarolina - **position description data is editable.**
- **Open Rank Faculty** recruiting will require updating the position before the candidate is hired or creating the position after the recruitment is finished (for example, if you hire multiple candidates from one posting).

# Two ePARs Instead of One



- **Certain updates** will move from **one ePAR** to **two ePARs** for any jobs that are not in positions today.
  - Examples:
    - Hire: (1) Create/Update position ePAR then (2) Hire ePAR
    - FTE Change: (1) Update position ePAR for FTE (2) Edit Existing Job ePAR for Compensation Amount
  - Position ePAR **must** fully execute prior to **starting** the hire or job change ePAR.

# Funding Swaps



Important: You must choose position not appointment when starting a Funding Swap.

# Student Originators



Student Originators will be able to:

- Make updates to positions.
- See more information in the system.

# Positions with Multiple Headcount



**Multiple headcount** will be available for EHRA Students, Faculty Contingent Workers (CWR) and EHRA Zero-Base Rate.

- Basic attributes, including funding, must be the same.
- Position budget amount should reflect total budget for all planned incumbents combined.



# Changes to the ePAR

# Position ePAR Changes



- **Reports to** field will be used consistently as all employees will be in positions.
- For EHRA Non-Faculty and SHRA Permanent and Temporary, the **Minimum Education and Experience Requirements** field will be read only.
- **Position Principal Functions** page will show for SHRA Permanent employees as well as EHRA employees.
- The **funding grid** will no longer be on the Position ePAR.
- The Allocated Budget field will be renamed **Position Budget Amount**.



# Position ePAR Changes (continued)



- **New fields** on the last page of the ePAR:
  - Immunization Review Required
  - Bloodborne Pathogen
  - Recruiting System
  - Campus Security Authority
- **New buttons** on the ePAR:
  - Save for Originators
  - Hold for Approvers – takes the ePAR out of everyone’s inbox at the same approval level.
- Budget approvers no longer have to approve position ePARs.

# Be Careful



The other ePARs haven't been changed yet.

## Hire ePAR

- Remember to add the *position number* to the Hire ePAR. The system will let you leave it blank, BUT DON'T.

## Funding Swap ePAR

- Remember to use the *position number* on the Funding Swap. The system will let you use the PID, BUT DON'T.



# Reports and Queries

# New Queries on the HR Dashboard



- ✓ **Fund Swap by Position** - Enter position number to get fund swap ePAR # and other info.
  - Access Position ePAR approval Routing info
  - Find position budget amount including incumbent salary
  - Available to all HR Reps, Basic Originators, Student Originators

NC\_HR\_FUNDSWAP\_EPAR\_BY\_POS - Fund Swap ePARs by Position nu

Position #

Fiscal Year - YYYY (Optional)

[View Results](#)

Row	ePAR ID	ePAR ID Create Date	Position Nbr	Empl Group	Job Code	Job Code Descr	Dept ID	Dept Description	Form Status	ePAR Executed Date	Fiscal Year	Incumbent(s) on Create Date	Incumbent PID/Empl Rcd	Incumbent UNC Long Title	Current Incumbent(s)	Current Incumbent ID/Empl Rcd	Current Incumbent Long Title	Current Head Count	Originator OprID	Last OprID
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# New Queries on the HR Dashboard (continued)



- ✓ **Vacant Position** report includes vacant positions with budget amount, prior incumbent information, in progress ePAR numbers, and offers different filter options.



# Resources



Find QRC's, recordings and more information on the

[Full Position Management website.](#)



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*of* NORTH CAROLINA  
*at* CHAPEL HILL