



UNM

# Fiscal Agents

November 2, 2011

---

# Position Management Update

Joyce McCarthy

Program Operations Director  
HR Process Improvements

# Position Management Update

- Institutional decision to stop “position control”
- Effective July 1, 2011 – HR took over the IB/PC(Position Management) Queue in UNMJobs
- Banner HR/Payroll & UNMJobs require the position concept-HR will do Position Management
- Will continue to use Salary Planner – a “position budgeting” tool

# Position Management Update

- Position Management will focus on accurate tracking and reporting of the HR related data of positions
  - Position Class Codes
  - Eclass
  - Grade
  - Salary Range
  - Minimum Requirements
  - Titles
- Once Position Budgets are set up in Banner HR/Payroll – Departments will update yearly during the Salary Planner process

# Position Management Update

What is being done to assist departments with Position Management:

- Single Position Data in UNMJobs will be synchronized with Banner Single Position Data by end of CY 2011
- Hyperion Report – PERH0079 will be available by 11/28/11 – Will need to request a new security role through the BAR

# Position Management Update

- Departments will have the opportunity to “clean up” positions prior to the yearly load to salary planner
- Form for clean up is provided in PERH0079 Report in Hyperion
- Provide Status changes, sign, and submit to [HRRP@unm.edu](mailto:HRRP@unm.edu)

# Position Management Update

## Position Status definitions:

- A-Active** – Position is budgeted, is either filled or department plans to fill during coming fiscal yr
- F- Frozen** – Position is vacant and no budget assigned – can be unfrozen
- C-Canceled-** Position is vacant, dept does not want to reclass and reuse Position # - cannot be made active in future

# Some Basic Guidelines on Position Management

- Org Codes on Positions and Jobs should always be the same
- Labor distributions on Jobs and Positions are not kept synchronized, “one brief moment...”
- Currently Labor Account codes on positions are what feed to finance – plan to change this process in the near future

# Some Basic Guidelines on Position Management

- Each org should only have one pooled position per type (i.e., TPT, On-Call, Student Work Study)
- You cannot reclass a position to post when the current incumbent is still in it
- New positions are created at the time of posting or through the appropriate Employment Area

# Some Basic Guidelines on Position Management

Key to effective Position Management is to select the right position whenever you begin an employment transaction.

The person responsible for position budgeting and the person responsible for employment transactions should be working together on Position Management.

# Follow-Up Questions

For questions regarding the Position Management Process please send an email to [UNMJobs@unm.edu](mailto:UNMJobs@unm.edu)

or

call Joyce McCarthy at 277-0988.

# OneSource

Joyce McCarthy

Program Operations Director  
HR Process Improvements

# How the OneSource Concept Began...

- Payroll Process Audit by Internal Audit
  - Called for reduction of Payroll adjustments due to late paperwork
  - Required core offices to provide better guidelines, instructions and published deadlines
- Best of Banner – prior to implementation of HR/Payroll Banner Module
  - Departments requested “Turbo-Tax” for employment transactions

# Overview of Site Concept

- A collaborative effort by all employment areas to provide consistent look and feel to employment transactions when possible
- Site will initially link to current documentation from each employment area – but goal is to eventually provide similar look and feel and consolidate where possible...
- Long term goal is to assist departments with submitting accurate, complete and timely employment transactions while maintaining accurate reporting and institutional compliance requirements
- As the employment areas **automate** transactions, site will assist employment areas in the communication of process changes

# OneSource

---

<http://onesource.unm.edu/>