WELCOME!

CEHD ESUP Training
“What if we don’t change at all ... and something magical just happens?”
Agenda

I. Position Management
II. Recruiting & Hiring Changes
III. Person of Interest (POI)
IV. New Terminology
V. Time & Absence
VI. Process Changes
VII. Papaya Deadlines
VIII. Questions
I. Position Management
NEW POSITION MANAGEMENT (PM) REQUEST FORM / PROCESS

### UNIVERSITY OF MINNESOTA
Position Management Request Form

<table>
<thead>
<tr>
<th>Purpose of Request:</th>
<th>New Position</th>
<th>[ ] Update Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>POSITION INFO:</td>
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<td>M/WF LOCATION INFO:</td>
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<td>Reg Report:</td>
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<td>Department:</td>
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<tr>
<td>Reports to Name:</td>
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<tr>
<td>SALARY PLAN INFO:</td>
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<td>Salary Account Plan:</td>
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<td>Step:</td>
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<td>Standard:</td>
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<td>HCM/OTHER INFO:</td>
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<td>FLSA Status:</td>
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<tr>
<td>Position Pool ID:</td>
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</tbody>
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CEHD | College of Education + Human Development

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University of Minnesota
Driven to Discover™
WHY IS POSITION MANAGEMENT (PM) IMPORTANT?

PM data is the **HEART** of HRMS. PM data flows downstream into Recruiting, Job Data, Compensation, Classification and other high-level modules. This data saves entry time by eliminating duplication of entry and ensures data accuracy. In addition, Position Management allows us to create, track, and view incumbents and position histories.

If a position isn’t set up in time or incorrectly, it will have negative effects, including:

- Employees not having the correct access to needed systems
- Employees not being paid on time
- Misrouting of timesheet approvals and absence requests
- Delays in benefits enrollment
- Delays in sick and vacation accrual

Please allow ample time for the position management and hiring process.
Prior to requesting a position:

- Discuss new positions with your HR Representative to review Job Descriptions and Job Codes
- Discuss budgets and chart strings with your Accountant to ensure that these are already set up

Why are we changing processes?

Central Payroll has designed the PM form to be used campus-wide, so there is completeness and consistency to the information that is essential to create or modify a PM number.
NEW CATEGORIES FOR PM#'S:

It is required that you go to UM Reports via the Reporting Center periodically to review your Department’s PM#'s, and inactivate the PM#'s that will not be used again.

There will be a couple new categories that will show up on your UM Report:

- **Active:** PM#'s that have incumbents
- **Vacant:** PM#'s that are Active, but do not have incumbents
- **Frozen:** PM#'s that are Vacant for one year
- **Inactive - INA:** PM#'s that are Frozen for one year – cannot be reused
DETERMINE WHAT TYPE OF PM# IS NEEDED

One-to-One Relationship Positions are required for all Faculty, P&A, and CS/BU

- This means that the PM# is unique to the position

Pooled Positions - used for Grad-Prof, Student Workers, and Temp/Casuals

- This means that the position most-likely will be used for more than one person, but on occasion, it may turn out to be a one-to-one relationship

- NOTE: When a position is posted for a Grad-Prof, Student Worker, or Temp/Casual – Best practice is to discuss the position with your HR Representative

WOS Appointments will now be Affiliates, which is part of the “Person of Interest” section of the HRMS system and outside of the PM system.
PM # REQUEST FORM – Access and Appearance

Recommended browser: either Mozilla Firefox or Internet Explorer. Chrome has issues.

Go to: http://www.policy.umn.edu/prod/groups/president/@pub/@forms/@hr/documents/form/um1803.pdf

If your browser appears with this view, click on the “Open With Different Viewer” button and once a prompt appears, choose “Open With”, choose Adobe Reader, and click on OK
### Position Management Request Form

#### Purpose of Request:
- [ ] New Position
- [ ] Update Position

#### Position Info:
- **Position Number:**
- **Headcount:**
- **Effective Date:**
- **Status:**
- **Position Title:**

#### JOB INFO:
- **Business Unit:**
- **Job Code:**
- **Full-Time:**
- **Regular:**
- **Title:**

#### WORK LOCATION INFO:
- **Reg Region:**
- **Department:**
- **Company:**
- **Reports To:**

#### SALARY PLAN INFO:
- **Salary Admin Plan:**
- **Step:**
- **Standard Hrs:**

#### OVERTIME INFO:
- **FLSA Status:**
- **Position Pool ID:**
- **FTE (Full Time Eqv.):**

#### COMMENTS:
- **Funding Source:**
- **Budget Notes:**

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The University of Minnesota is an equal opportunity educator & employer.

Page 1 of 2
BEGIN THE PM # REQUEST FORM

Purpose of Request: Choose “New Position” or “Update Position”
Headcount: Enter the amount of incumbents who will use this new PM#
Effective Date: Enter today’s date – cannot future-date this field
Reason: Choose from the red outlined box
Copy Position #: If there’s a PM# that has attributes similar, enter that PM#
Status: Choose “Active”
Status Date: N/A
JOB INFO

Job Code: Enter the Job Code – Examples: 9401, 1888, 2221
Reg/Temp: Choose Regular or Temporary (less than 3 mo. appt.)
Title: N/A
Full/Part Time: Choose Full-time or Part-time (less than 40 hrs per week)
Detailed Position Desc: If a new job description, use “See update on page 2”
If a position description that has been used before and not changed, use “Description remains unchanged”
### WORK LOCATION INFO and SALARY PLAN INFO

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td>Enter the 5-digit department # - Example: 11192, 11207, 12162</td>
</tr>
<tr>
<td>Reports To #:</td>
<td>Enter the 6-digit reports to # - this is the PM# of their Supervisor’s Main Appt., not the Employee ID#  NOTE: Cannot be a WOS appt.</td>
</tr>
<tr>
<td>Company:</td>
<td>Enter either UMN or UNS (used for fellows)</td>
</tr>
<tr>
<td>Location:</td>
<td>N/A</td>
</tr>
<tr>
<td>Reports To Name:</td>
<td>Enter last name, first name of manager/supervisor</td>
</tr>
<tr>
<td>Standard Hrs:</td>
<td>Enter the standard hours - This is one week’s hours (max: 40 hrs)</td>
</tr>
</tbody>
</table>

#### WORK LOCATION INFO:

<table>
<thead>
<tr>
<th>Reg Region:</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td></td>
</tr>
<tr>
<td>Reports To #:</td>
<td></td>
</tr>
</tbody>
</table>

#### SALARY PLAN INFO:

<table>
<thead>
<tr>
<th>Salary Admin Plan:</th>
<th>Defaults from Job Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step:</td>
<td>Maintained in Job Data Pages, Grade:</td>
</tr>
<tr>
<td>Standard Hrs:</td>
<td>Defaults from Job Code, Work Period:</td>
</tr>
</tbody>
</table>
Position Pool ID: N/A
Notice Rights: N/A
Classified Indicator: If a Research or Teaching position, designate it here
FTE (Full Time Equ.): Enter FTE – Examples: 1.0, .75, .5, .25
Adds to FTE Actual Count: If the FTE is greater than .01 check this box
COMMENTS

Be Specific in your comments...
1. Who is this position for?
2. Is this a summer appointment?
3. If this is a Job Code change that increases or decreases the salary, then that information will need to be supplied here, because Central Payroll will make these adjustments when they do the PM# modification.
4. Enter the Funding Source CF String here.
Departments should send the completed PM form as a PDF email attachment to the new CEHD PM Request email at cehd-pm@umn.edu. This can be done within Adobe Reader, after an initial setup.

CEHD HR Payroll will then reply with the position number, once it is established.

We will be sending out invitations to meetings within your offices during the week of April 13 – 17th. This will give you time to become familiar with the form and to prepare questions that you might have prior to this meeting.
LET’S TEST YOUR KNOWLEDGE...

Scenario:

- New Employee
- Dept 11192
- Job Code 9402
- Starts on 6/15/15
- Appointment is greater than 3 months
- Appointment is 36 hours per week
- Reports to 275456 Doug Forest
- Funding source: Fund: 1000 Dept: 11192 Program: 20000
### Position Management Request Form

**Purpose of Request:**
- [ ] New Position
- [ ] Update Position

**Position Info:**
- Position Number:
- Copy Position # (continue)
- Business Unit:
- Effective Date:
- Rehire:
- Position Status:

**Job Info:**
- Job Code:
- Position Title:
- Regular Shift:
- Evaluated Position:
- Salary/Comp:

**Work Location Info:**
- Department:
- Business Unit:
- Location:
- Salary/Comp:

**Additional Info:**
- FLSA Status:
- Position Pool ID:
- Notice Period:

**COMMENTS:**
- Funding Source:
- Position Title:
- Project:
- Approval Date:
- Effective Date:
- Approved By:
- Approved By:

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**Position Description:**
- Include the OHR guidelines for writing a position description located at:
  https://www.umn.edu/hr/Policies/centralhr/D711.pdf
- New positions will require a position description,
- Updated positions, depending on the nature of the change, may require revisions to existing position descriptions.

**REQUIRE Position Description (required based on OHR guidelines):**
- Position Manager can copy and paste text into HRMS.
WHERE TO FIND INFO ON HOW TO FILL OUT THE NEW FORM?

Go to the Job Aids:
http://sky.cehd.umn.edu/hr/position-management/ and choose “Writing a Position Description”

• Creating a New Position Job Aid
• Pooled Position Job Aid
• Position Pages Field Names and Definitions Job Aid
• Full Time Equivalent (FTE) Calculations Job Aid
• Position Management Approval Job Aid
• Updating Existing Positions Job Aid
• Updating Existing Positions Reason Codes Job Aid
II. Recruiting & Hiring Changes
(Julie)
Hiring through Recruiting Solutions

- **Roles:**
  - *Search Committee Member* = Actual Hiring Authority & Search Committee (where applicable)
  - *Hiring Manager* = Department Adm. & HR Liaisons
  - *Unit Recruiter* = CEHD HR Partner
  - *Central Recruiter* = OHR Staffing Consultant
Hiring through Recruiting Solutions

• Create job postings for:
  – All job openings needing an applicant pool
    • Most Faculty, P&A, CSBU positions
    • Some undergraduate student positions
  – Temp No Post positions
    • Does not require applicant pool
  – Direct Hires
    • Seldom used; requires HR Director prior approval
    • Does not require applicant pool

• New Process: See handout job aid
Hiring through Papaya
(Non-Recruiting Solutions Hires)

• For hires where job posting is not required:
  – Temp/Casual appointments
  – Undergrad Student appointments
  – Graduate Assistants
  – Summer appointments

• Slightly modified process:
  – See handout job aid
Papaya Changes

- New entry option for “Non-Recruiting Solutions Hire”
Papaya Changes

- Routing changes
- Accountants will now close out all papayas related to distribution entries
III. Person of Interest
(Aundrea)
Person of Interest (POI)

• A POI does not typically have a paid appointment with the University.

• Some examples of POI’s are:

  • Affiliate (performs work under an unpaid appointment, formerly known as without salary (WOS))
    – Visiting Scholars, advisory committee

  • External Service Provider (ESP) (requires access to University systems such as ROTC, IT contractors)

  • Tenure Tab-Used for retaining tenure information within an existing record
IV. New Terminology (Cali/Mark)

<table>
<thead>
<tr>
<th>Old</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Terms</td>
<td>Pay Groups (P09, P12, etc) and expected end / actual end dates</td>
</tr>
<tr>
<td>Adjunct / Z-Term Appointment</td>
<td>Academic Temp/Casual Appointment</td>
</tr>
<tr>
<td>Earnings Codes for Regular Pay (REG, URG)</td>
<td>Rate Codes (BASE, HRLY)</td>
</tr>
<tr>
<td>Regent’s Professor, Dean, and Chair Appointments</td>
<td>Component of Pay</td>
</tr>
</tbody>
</table>
V. Time & Absence (Mark)

- **Time Reviewers**
  - Look at the timesheets daily
  - Deadline: Review by **Tuesday at Noon** the week following pay period close.

- Review Schedules for Exception Hourly & Salaried Employees by **Wed, 4/29**

- Timesheets should be approved by **Tuesday, May 5** for pay period April 20-May 3
VI. Process Changes (Mani)

- All leaves (including Faculty and P&A professional development leaves), will be initiated via Papaya by the Department.
  - Payroll will verify entries against HR records & complete entries in HRMS
- Phased retirements/terminal agreements will be initiated via Papaya by the Department.
  - Payroll will verify entries against HR records & complete entries in HRMS
- Terminations entered after May 1, do NOT send COBRA notices. OHR will send.
VII. Papaya Deadlines

- May Session & Summer Term begin May 25, 2015 (Classes begin Tues., May 26, 2015)
  - Papayas due: **Friday, May 15, 2015**
  - HR Payroll has 7 days to process

  - Papayas due: **Friday, May 29, 2015**
  - HR Payroll has 11 days to process

- P09 (formerly B-Term): August 31, 2015 (Fall classes begin Tues., September 8, 2015)
  - Papayas due: **Friday, August 14, 2015**
  - HR Payroll has 11 days to process

- P09 (formerly B-Term): January 14, 2016 (Spring classes begin Tues., Jan. 19, 2016)
  - Papayas due: **Thursday, December 31, 2015**
  - HR Payroll has 9 days to process
Questions