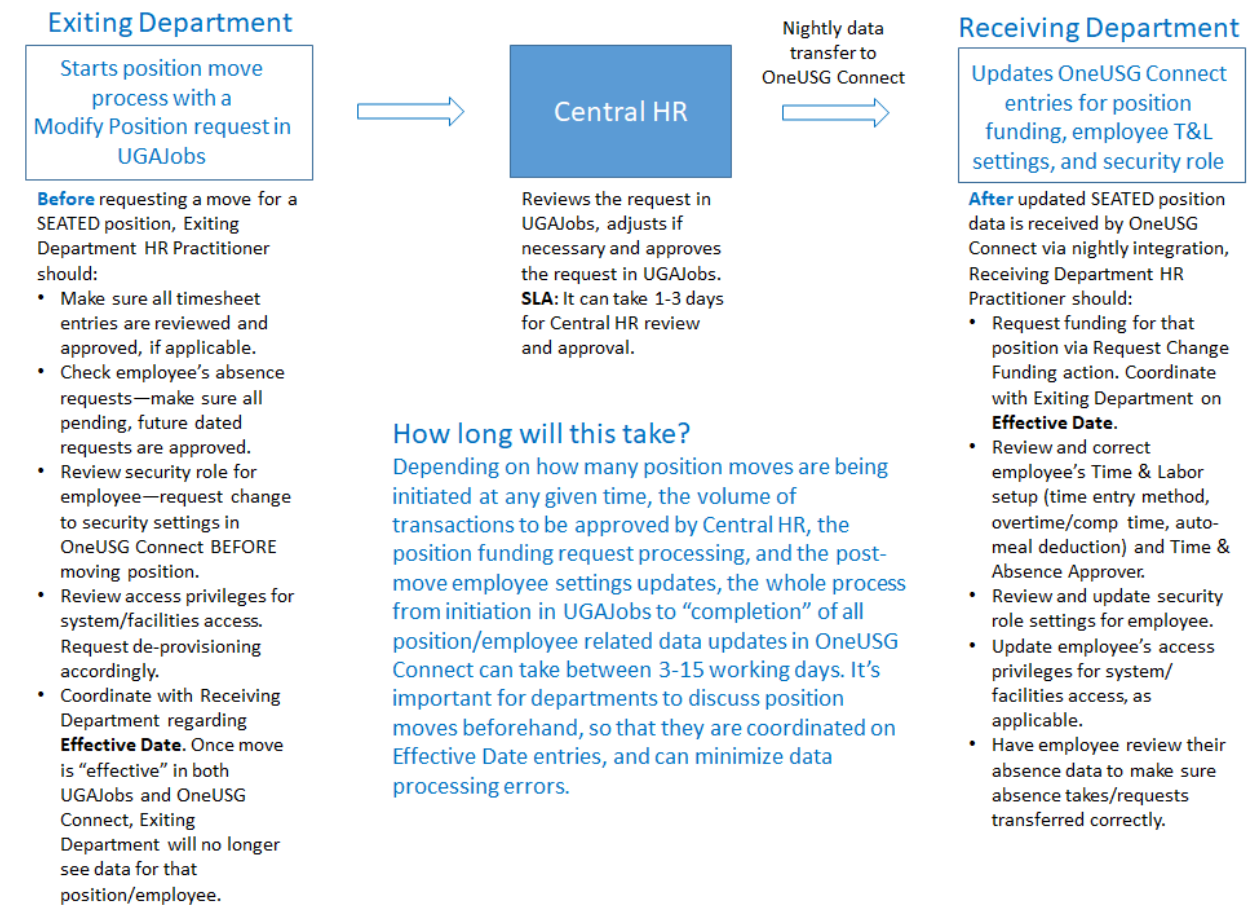


Overview

This SOP describes the process for requesting a position to be moved from one department to another. The process is initiated in UGAJobs by the “exiting” department with a request to modify a position. Once a request to move a position to another department is approved in UGAJobs by Central HR, the updated data will flow into OneUSG Connect with the daily data integration process that runs every evening.



How long will this take?

Depending on how many position moves are being initiated at any given time, the volume of transactions to be approved by Central HR, the position funding request processing, and the post-move employee settings updates, the whole process from initiation in UGAJobs to “completion” of all position/employee related data updates in OneUSG Connect can take between 3-15 working days. It’s important for departments to discuss position moves beforehand, so that they are coordinated on Effective Date entries, and can minimize data processing errors.

Timing and Effective Date: Both departments should agree on the timing of the move for SEATED positions and should use the same Effective Date when initiating the move in UGAJobs and setting up the employee/position in OneUSG Connect AFTER the move. See SOP_POS_014 Checklist for Moving a Position to Another HR Department for a summary of actions that both departments should follow.

Moving a Position to another HR Department**SOP_POS_013**

The position change for a seated position will have an impact on several modules in OneUSG Connect, most notably:

- Time & Labor
- Commitment Accounting (position funding)
- Security & Workflow
- Identity Management and Access

The “receiving” department then has the responsibility for reviewing the impacts to OneUSG Connect modules and making the necessary adjustments for the positions after they have been moved (outlined in this SOP below).

If you are moving fewer than 20 positions at a time, you can manage these individually in UGAJobs and OneUSG Connect, using the information in this SOP. If the number of positions is 20 or greater, you will want to start the process by contacting Central HR to assist.

Preparing to Move a Position(s)

It is imperative that the two departments involved COMMUNICATE CLEARLY about the positions to be moved. Specifically, they should discuss the following items:

1. **Timing.** When do the departments want to make this move? Ideally, the moving of a seated position will coincide with the applicable pay period for the position (which is different for bi-weekly and monthly employees). See the monthly and bi-weekly practitioner payroll processing calendars available on the [Payroll Calendar website](#) for guidance on when to submit position moves. The timing element is tracked in UGAJobs and OneUSG Connect in the Effective Date fields. The date entered in the Effective Date fields should coincide with the position funding effective date, so that the position is funded appropriately by the Receiving Department.
2. **Approve Time and Absence entries for seated positions.** If the position being moved is a seated position, make sure to approve all entered time and absence requests, if applicable.
3. **Position Funding.** The funding for a position does not “follow” the position after a move. A seated position MUST have the proper funding or it will go to the Suspense combo code for the receiving department. It is essential for the receiving department HR practitioner to be ready to submit the Submit Change Position Funding request in OneUSG Connect after the position is moved. See the Commitment Accounting section of this SOP for information on how to perform this transaction and the data elements required.
4. **Moving Positions to a Newly Created Department?** If the receiving department will be funding the position in an HR department that has never been used before, Central Commitment Accounting will need to set up the funding for the initial position in

Moving a Position to another HR Department

SOP_POS_013

that department. After the first funding record has been set up for the department, the receiving department can then use the Manager Self Service Change Position Funding page to fund all additional positions in the department.

5. **Seated or Vacant Position:** if the position is vacant, then the departments may not need to update Time & Labor settings, Security & Workflow, or Identity Management and Access items in OneUSG Connect. If the receiving department wishes to fund a vacant position, then they can do so. However, a seated position MUST have position funding set up in the receiving department.
6. **Reports To Supervisor:** Will the Reports To Supervisor change for the position after it is moved? If so, the name and PeopleSoft position number for that individual should be conveyed to the Exiting Department HR Practitioner so that it can be noted in UGAJobs during the position modification step.
7. **Security Role in OneUSG Connect:** Does the employee in the position that is moving have a security role that should be updated/terminated once the position is moved? If so, the Exiting Department HR Practitioner must complete a "Submit a Security Request for Your Employee" action in OneUGS Connect (via Manager Self Service) before the position is moved to alter the security role for that employee. After the position is moved to the other department in OneUSG Connect, the Receiving Department HR Practitioner should then complete a "Submit a Security Request for Your Employee" action if they desire to set the security role for the employee.
8. **Security Access Role in Financial Management System.** The Receiving Department will need to complete an Access Request Form (ARF) in the Financial Management System, either confirming that no security/access changes are needed (via comments) for this employee, or requesting the necessary changes to security role in FMS.
9. **Identity Management (IDM) and Access Privileges.** If the employee in the position being moved has any kind of special access rights in the IDM system (for example, access to restricted areas), that should be noted and addressed by both the Exiting and Receiving Departments. The Exiting Department should de-provision access privileges, as appropriate, following department protocols and the Receiving Department should request the appropriate access privileges for the employee after the move, following the new department's established protocols.

Roles and Responsibilities

Roles involved in Position moves include the following:

- **Department HR Practitioner (exiting department):** initiates the position move request in UGAJobs via a Modify Position request.
- **UGA Central HR:** reviews and approves the position move request in UGAJobs and enters the appropriate changes that will be fed to job data in OneUSG Connect.
 - HR will send a request to move a faculty position to the Office of Faculty Affairs. Faculty Affairs will determine and inform the unit and Central HR if the position move is approved or denied.
- **Department HR Practitioner (receiving department):** responsible for managing the “downstream” OneUSG Connect module impacts after the position move request is approved in UGAJobs (see Key Process Steps: OneUSG Connect section below).

Key Process Steps: Initiating the Position Move in UGAJobs

- 1. The two departments involved should communicate with each other to make sure the exiting department has the correct information to enter into UGAJobs to initiate the position move request.**

This information includes:

- The name and PeopleSoft (OneUSG Connect) position number of the position being moved
 - The name and number of the HR department the position is moving TO
 - If the Reports To Supervisor will change with the move, the name and PeopleSoft (OneUSG Connect) position number of the new Supervisor
 - The new paygroup for the employee after the position is moved
 - The actual address/location of the position after the move
 - The Effective Date of the position move (both departments should agree on this date)
- 2. Before initiating the transaction to move a seated position in UGAJobs, the Exiting Department HR Practitioner should review several employee-related items: whether they have pending (unapproved) time entries in their timesheet and future absence requests, their OneUSG Connect security role, and whether they have special systems/facilities access privileges. If the position being moved is vacant, this step does not need to be completed.**

Review and approve timesheet entries and future dated “pending” absence requests:

- To avoid timesheet issues after the move, make sure to review and approve any entered time for this employee.
- If the employee has future dated absence requests, the exiting Department HR Practitioner should make sure these requests are approved in OneUSG Connect before moving the position. Unapproved pending absence requests will be lost after the move, so the employee would need to enter them again in OneUSG Connect after the position move.

Review employee’s current OneUSG Connect security role:

- If changes need to be made to the employee’s security role in OneUSG Connect, the system manager should complete a “Submit a Security Request for Your Employee” action in OneUGS Connect (via Manager Self Service) to alter the security role for that employee.
- For step-by-step instructions on how to perform this transaction in Manager Self Service, see the tutorial [Submitting a Security Request for your Employee](#) in the OneSource Training Library.

Review employee’s system/facilities access privileges:

- Any seated position move to another department may have an impact on an employee’s specific access privileges. It is the responsibility of the two departments to make sure the employee’s access privileges are updated/changed accordingly, following established department protocol.

3. The Department Practitioner for the exiting department initiates the position move request in UGAJobs using a Modify Position transaction. For more information on how to perform this task in UGAJobs, see the [UGAJobs Position Manager Initiator Manual](#).

- Access the Position Management module in UGAJobs and search for the position that needs to be moved to the new department.
- When you have selected the position, choose Modify Position Description. From the Position Justification listing, select all appropriate options that apply:
 - **Change Major Unit** – Check this option when a position changes from a major unit such as VP for Finance and Admin to the VP for Research.
 - **Change Division** – Check this option when a position changes from a division such as the College of Public Health to the College of Arts and Sciences. These

Moving a Position to another HR Department**SOP_POS_013**

changes will most likely be under the same major unit. For example, both divisions are under the major unit of SR VP for Academic Affairs & Provost.

- **Change Department** – Check this option when a position changes from a department such as the Public Health Dean's Office to the Public Health Global Health Institute. Similar to the division change, most likely when changing departments the position will remain in the same division and in the same major unit.
 - **Very important: In the "Justification of Need" field include the name and number of the HR department that the position is moving to. Also include the name and PeopleSoft (OneUSG Connect) position number of the new Reports To supervisor, if applicable. Finally, include the employee's new paygroup, if applicable.**
 - Click on the Next button to move through the screen categories and complete the applicable fields.
 - Note that the **Effective Date** should reflect the date this position move should become active (this can be a future date). This should be a date that is agreed upon by BOTH DEPARTMENTS, and is critical for seated positions, as it may impact the employee's pay. For bi-weekly employees, this date should be the first day of the pay period; for monthly employees this date should be the first day of the month. See the monthly and bi-weekly practitioner payroll processing calendars available on the [Payroll Calendar website](#) for guidance on when to submit position moves.
- 4. UGA Central HR Position Management receives the modification request for the position move, reviews the details, and makes any necessary adjustments. Once all required fields are correct and complete, Central HR approves the transaction in UGAJobs.**
- Once Central HR approves the transaction in UGAJobs, the initiator (Exiting Department HR Practitioner) receives notification of the approval via UGAJobs notification.
- 5. The Exiting Department HR Practitioner should then let the Receiving Department HR Practitioner know via email that the move has been approved in UGAJobs and that the data will be transferred to OneUSG Connect that night.**
- Once the position details have been transferred to OneUSG Connect, the Department HR practitioner for the receiving department MUST review the impacts to the OneUSG Connect modules for that employee, as described in the section below.

Key Process Steps: OneUSG Connect

The position change for a seated position will have an impact on several modules in OneUSG Connect, most notably:

- Time & Labor
- Commitment Accounting (position funding)
- Security & Workflow
- Identity Management and Workflow

The Receiving Department HR Practitioner will need to review information and may need to make changes in the following modules for a seated position. **This review and update should take place within 1-3 business days of the data transfer from UGAJobs to OneUSG Connect. Note: the Receiving Department will not see the data in OneUSG Connect for a moved position, until (or after) the Effective Date.**

Time & Labor

When a seated position is transitioned into a new department, the auto-enrollment for Time and Labor for the employee seated in that position may or may not be triggered in OneUSG Connect. If auto-enrollment is triggered, this will reset the Time Entry Method, Overtime vs. Comp Time, auto meal deduction, leave special accrual, and the Time and Absence Approver back to the standard settings for that pay group.

The best practice is for the Receiving Department HR Practitioner to run the ABS Enrolled Employee Query (180_TL_ABS_ENROLLED) to see the Time & Labor settings for all employees in your department. That way you can check to see if you need to update the Time Reporter settings for the newly moved employees.

These “resets” impact mainly nonexempt employees, because they will have the most changes to their Maintain Time Reporter page. The only impact to exempt employees will be for the Time and Absence Approver and the non-standard leave accruals. The standard enrollment setup for nonexempt employees is as follows:

- 18H
 - Comp Time
 - Manual Time Entry
 - No Meal Deduction
 - Time and Absence Approver defaults to Reports To
- 18C, 18T, 18W
 - Overtime
 - Manual Time Entry
 - No Meal Deduction
 - Time and Absence Approver defaults to Reports To

Moving a Position to another HR Department**SOP_POS_013**

If the unit uses a Kaba Clock, the employee should auto-enroll into the Kaba Clock and into the correct overtime/comp time setup for that department. However, it's important to run the ABS Enrolled Employee Query (180_TL_ABS_ENROLLED) to confirm.

- 1. The Receiving Department HR Practitioner should run the ABS Enrolled Employee (180_TL_ABS_ENROLLED) query to see the current Time and Labor settings for employees including Time & Absence Approver and Time Entry Method. For more information on how to run this query and interpret the results, see the [Querying TL & ABS Enrolled Employees tutorial](#) in the OneSource Training Library.**

Timing: it is critical to complete the OneUSG Connect transactions as soon as possible after the data transfer from UGAJobs to OneUSG Connect and the Effective Date entered in UGAJobs has occurred.

- 2. To update Time Entry Method, Overtime/Comp Time, or Auto Meal Deduction for an employee:**

- The unit should submit a ticket to OneUSGSupport@uga.edu. Make sure to include the following information:
 - Employee ID
 - Employee Name
 - What needs to change
 - Transaction date (must be on or after the Effective Date entered in UGAJobs to initiate the position move, and must be at the beginning of a pay period).
- For more information about this process, see the [Enroll/Update Time Reporter SOP](#).

- 3. To update the Time and Absence Approver:**

- A System Manager in the receiving unit/department will need to request an update of the Time and Absence Approver through Manager Self Service.
- For a step-by-step instructions on how to complete this transaction in OneUSG Connect, see the tutorial [Requesting a Change to Time and Absence Approver](#).

Note about Effective Dates and Transaction Dates

When requesting changes to an employee's Time & Labor setup and Time & Absence approver, make sure you enter a date that aligns with the Effective Date of the position move. For example, if the Effective Date entered in UGAJobs when a position move is initiated is April 1 (of the current year), then the Transaction Date for any of the transactions in OneUSG Connect noted above should be on or AFTER that date (not before). These dates should also be at the beginning of a pay period.

Commitment Accounting (Position Funding)

When a seated position is moved to a new HR department, a change position funding request must be submitted by the receiving department. This is because the combination of set ID, HR department, position number, and fiscal year represent a unique funding record in OneUSG Connect. Therefore, if any one component changes, a new funding record is created.

1. The HR Department Practitioner (System Manager role) for the receiving department must initiate a Submit Change Position Funding Request in Manager Self Service.

- For general information on how to complete this task, see the [Position Funding SOP](#); or, for step-by-step instructions, see the tutorial [Submitting a Change Funding Request](#).
- **Note about New Combo Code Effective Dates:** When requesting a new combo code, make sure the effective date for the new combo code correlates to the pay period for which it is needed. A combo code cannot be used for funding in OneUSG Connect prior to the combo code effective date. For example, if a combo code is needed for the pay period **begin** date of 12/16/2018, the effective date of the combo code should be 12/16/2018 or earlier.
- **Position Funding Effective Date and Timing.** Effective dates play a crucial role when funding a position. The position cannot be funded in the Receiving HR Department prior to the effective date of the transfer. For example, if the transfer effective date is entered as 02/02/2019, the effective date for the funding of the position in the Receiving HR Department cannot be prior to 02/02/2019.

More on Position Funding Effective Date

The position funding effective date will need to cover the appropriate pay period based on the pay frequency. Each pay group falls within one of two pay frequencies: bi-weekly or monthly. The monthly and bi-weekly practitioner payroll processing calendars are available on the [Payroll Calendar website](#).

For a position that has a bi-weekly pay frequency, the position funding effective date would generally be the pay period **begin** date for the bi-weekly pay run. For a position that has a monthly pay frequency, the position funding effective date would generally be the pay period **begin** date for the monthly pay run. Depending on the situation, the funding effective date may fall to a date in the middle of a pay period. In those situations, the position funding effective date should be the **first day** the position is to be funded by the new HR department.

The receiving HR department should consult the UGA Practitioner Payroll Processing Schedule (on the [Payroll Calendar website](#)) to determine the deadline for submitting the position funding request. The deadline is different for bi-weekly and monthly pay frequencies.

Security & Workflow

Security roles and access provisioning are attached to the employee not the position. Therefore, when a seated position is moved to a new department, several security and access provisioning settings for the moved employee must be reviewed and updated in several systems (OneUSG Connect, Financial Management System, and IDM). The Receiving Department HR Practitioner must review the employee's security roles in OneUSG Connect to determine what changes, if any, need to be made. The HR Practitioner/CBO for the department must also make sure the employee's security provisioning in the Financial Management System is correct. Finally, the HR Practitioner/CBO should review what additional access privileges may be needed and follow standard department protocols for requesting.

- 1. To review security roles for an employee, the Department HR Practitioner for the receiving department can run these queries:**
 - **Departmental Approvers (180_SEC_DEPT_APPROVERS).** This query shows employees with Security Roles of Approver Level 1 and 2 by Department group.
 - **System Manager Access (180_SEC_ROW_BY_DEPARTMENT).** This query is used to identify which individuals have the System Manager Initiator role and permissions.
 - **Security Roles (180_SEC_USER_ROLES).** This is not a work center query. This will need to be run by a user with query viewer access. This query will display the security roles tied to a user. For example, System Manager and Query Viewer.
- 2. If changes need to be made to the employee's security roles in OneUSG Connect, the Department HR Practitioner (System Manager role) should submit a security request via Manager Self Service.**
 - For step-by-step instructions on how to perform this transaction in Manager Self Service, see the tutorial [Submitting a Security Request for your Employee](#) in the OneSource Training Library.
- 3. To make sure the employee is correctly set up with security provisioning in the Financial Management System, the employee's new Reports To Supervisor should submit an Access Request (ARF) form in the Financial Management System. For step-by-step instructions, see the tutorial [Requesting UGA Financial Management System Access](#) in the OneSource Training Library.**
 - **Note:** The OneSource Security team runs regular reports to identify moved positions and will send an email to the employee's new supervisor requesting that they submit an ARF form for the employee within two weeks of the Effective Date of the position

Moving a Position to another HR Department

SOP_POS_013

move. If an ARF is not submitted within 30 days of the Effective Date of the move, the security provisioning for that employee will be terminated.

- The new supervisor will have two (2) weeks from the Effective Date of the position move to submit an Access Request Form in the Financial Management System, either confirming that no changes are needed to security role (via comments), or requesting the necessary changes.
- If there are multiple positions (more than 20) being moved to a department at a time, the new supervisor can utilize [this Team Dynamix form](#) to set Financial Management System Access, **as long as the employees who have been moved will retain the same system permissions.** This form can be used to ease the burden of having to submit Access Request Forms for each user individually.

4. If the employee requires additional access provisioning through IDM to systems or facilities, the receiving department should follow established department protocol for granting the additional access privileges.

- It is the responsibility of the two departments to make sure the employee’s access privileges are updated/changed accordingly.

Relevant Resources

List of resources and links:

- [Payroll Calendar website](#)
- [UGAJobs Position Manager Initiator Manual](#)
- [Querying TL & ABS Enrolled Employees tutorial](#)
- [Enroll/Update Time Reporter SOP](#)
- [Requesting a Change to Time and Absence Approver](#)
- [Position Funding SOP](#)
- [Submitting a Change Funding Request tutorial](#)
- [Submitting a Security Request for your Employee tutorial](#)
- [Requesting UGA Financial Management System Access](#)

Approval

Name	Date
Lindsey Van Note	April 2019