

UNIVERSITY OF MINNESOTA

BUSINESS PROCESS:

Processing Changes to Positions and Job Records Retroactive to 6-9-08 EFS Conversion

Questions? Call Human Resources, 612-625-2016

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Retroactive to 6-9-08 EFS Conversion**

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General Statement

The effective date for the HRMS conversion to EFS was 6-9-2008, the first day of payroll fiscal year 2009. Following the conversion (6-14-08), changes to positions and job records retroactive to the 6-09-08 date need to take into account the change of Department to Entity and CUFS account into the new Financial Account String.

Position Management

Creating a New Position With an Effective Date Prior to 6/9/2008

The new position is created by the Position Manager using the normal procedure excepting that Department prior 6/9/2008 is the current Entity (e.g. use 681A not 10093 Equal Opportunity/Affirmative Action). The post conversion 5 digit Department number must be included in the notes section of the 'Add and Maintain Position Data' request. If the Department number is not provided in the notes section, the request will be returned.

After Central HRMS staff processes the request, they will enter an effective dated 6/9/2008, Position Conversion row which will modify the position to reflect the new 5 digit Department number.

When the 6/9/2008 position row is in place, the new hire job row can be entered.

Modifying a Position Retroactive to the 6-9-08 EFS Conversion Date.

The Position Manager must use the modification option 'Position Data Affecting Job' and make sure that Department is set to the appropriate Entity value prior to the conversion.

If the modification is due to a transfer or a reorganization which changes the new 5 digit Department number, the Position Manager should include a note asking the Central HRMS staff to change the 6/9/2008 conversion row to the correct 5-digit Dept ID.

Administer Workforce

Hire Into a New Position Retroactively Created to the 6/9/2008 Conversion Date.

- Enter the Hire row as normal, remembering that the position number will place the Entity value in the Department field (Entity displays identically to Department on pre-conversion rows).

- Enter a 6/9/2008 row, with Action /Reason of Data Change / Position. Blank out the position number and tab out of the field, enter the position number again and tab out of the field once more. The 5 digit Department number will populate the Department field and Entity continues to display.
- After the HRMS/EFS conversion, the system will accept only Combo Codes in Earnings Distribution. (This means combo codes must be used on historical distributions rows as well as current distribution rows.)

Modifying a Job Record Retroactive to the 6-9-08 EFS Conversion Date.

An HRMS correction form needs to be submitted on all retroactive changes. Central HRMS will adjust records as needed.

Modifying a Job Record Retroactively That Was Not Converted.

Job rows effective dated prior to 6-9-08, that do not have a 6/9/2008 Data Change/Conversion row were not converted. When you need to make a change to a non-converted record, enter the information in the following manner.

- Enter the modification as normal, remembering that the position number will place the Entity value in the Department field (Entity displays identically to Department on pre-conversion rows).
- Enter a 6/9/2008 row, with Action /Reason of Data Change / Position. Blank out the position number and tab out of the field, enter the position number again and tab out of the field once more. The 5 digit Department number will populate the Department field and Entity continues to display.
- After the HRMS/EFS conversion, the system will accept only Combo Codes in Earnings Distribution. (This means combo codes must be used on historical distributions rows as well as current distribution rows.)

Entity Entry Date

Following the HRMS/EFS conversion the Entity Entry Date will be equal to the Department Entry Date.

- As transfers between Departments within an Entity occur, the Department Entry Date will change, but the Entity Entry Date will not.
- As transfers out of an Entity occur, the Entity Entry Date will then change.
- Rows effective dated prior to 6-9-08 will have identical Departments and Entities displayed.