

# Position Control in PeopleSoft

Presented by SDCOE EBS | May 16, 2019

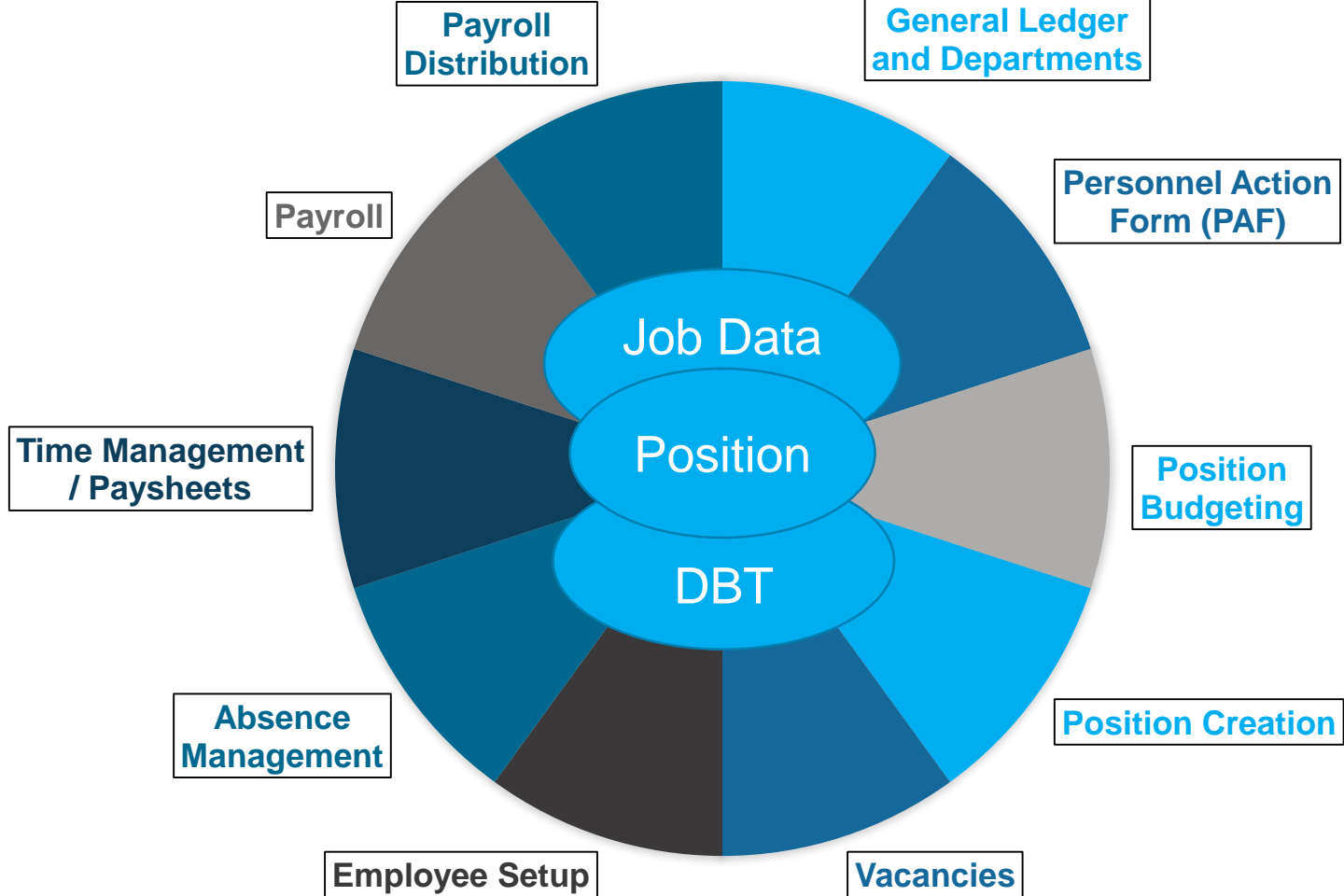
# About This Demo

Position Control goes beyond the Add/Update Position screen in PeopleSoft and often staff from different departments across HCM and FIN are involved in the management and maintenance of Positions. There are existing resources and queries that can help make cross department planning, communicating, timing, and auditing easier and some PeopleSoft components related to Position Control on the horizon that will be available to districts in the future.

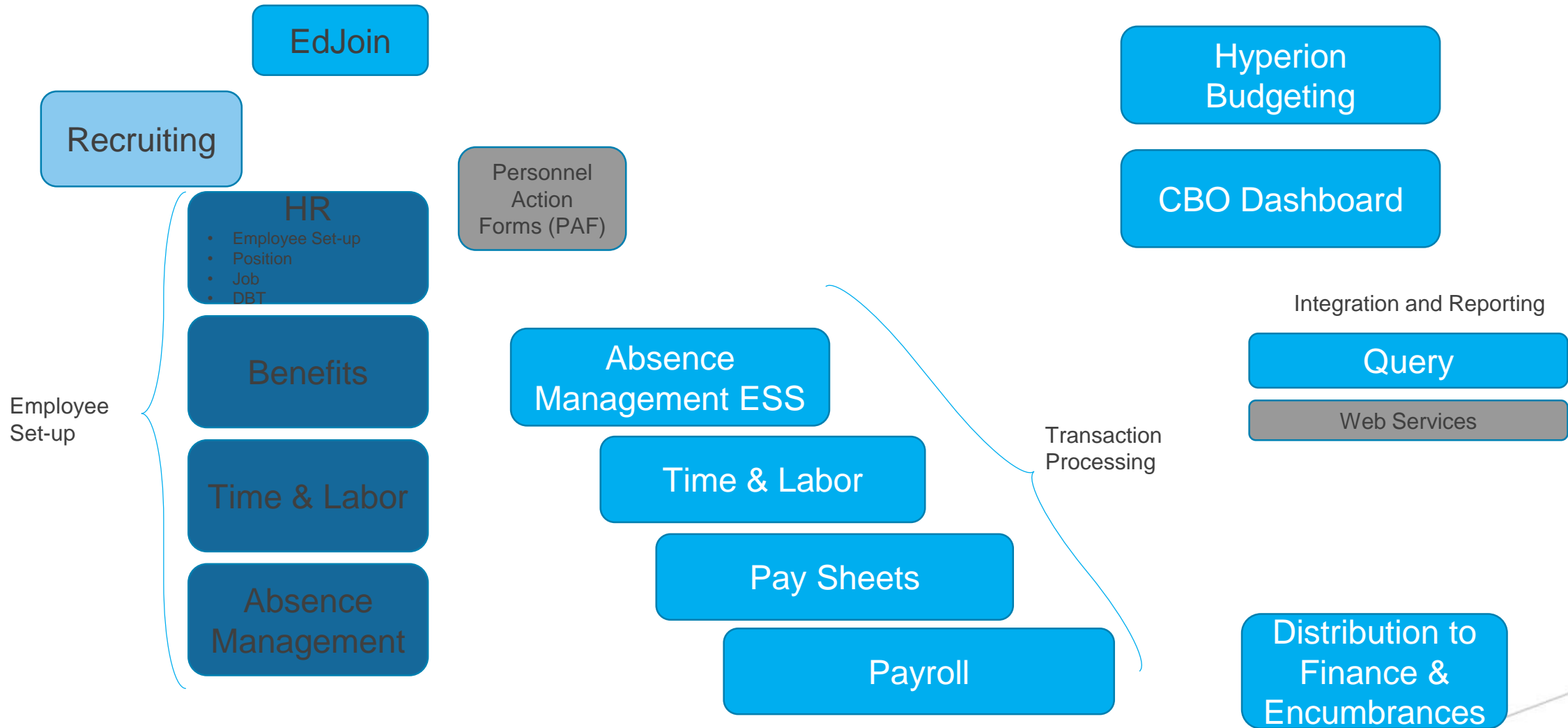
## TOPICS

- What is Position Control in PeopleSoft?
- Recruit to Pay current solutions
- Recruit to Pay future projects
- The integration of the various modules related to Positions
- Things to consider when making changes to Positions
- Resources available related to Position Control

# POSITION CONTROL

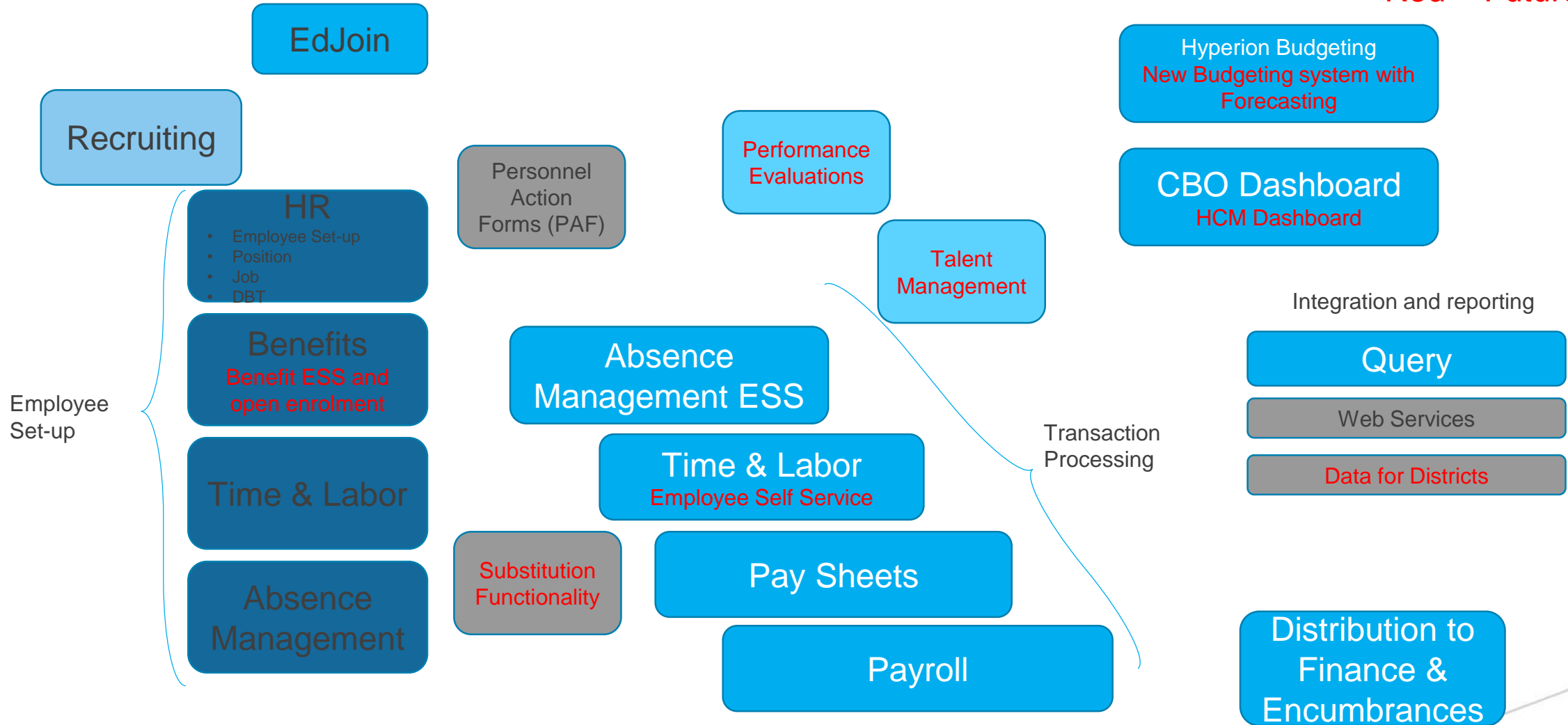


# Recruit to Pay Current Solutions (MAY 2019)



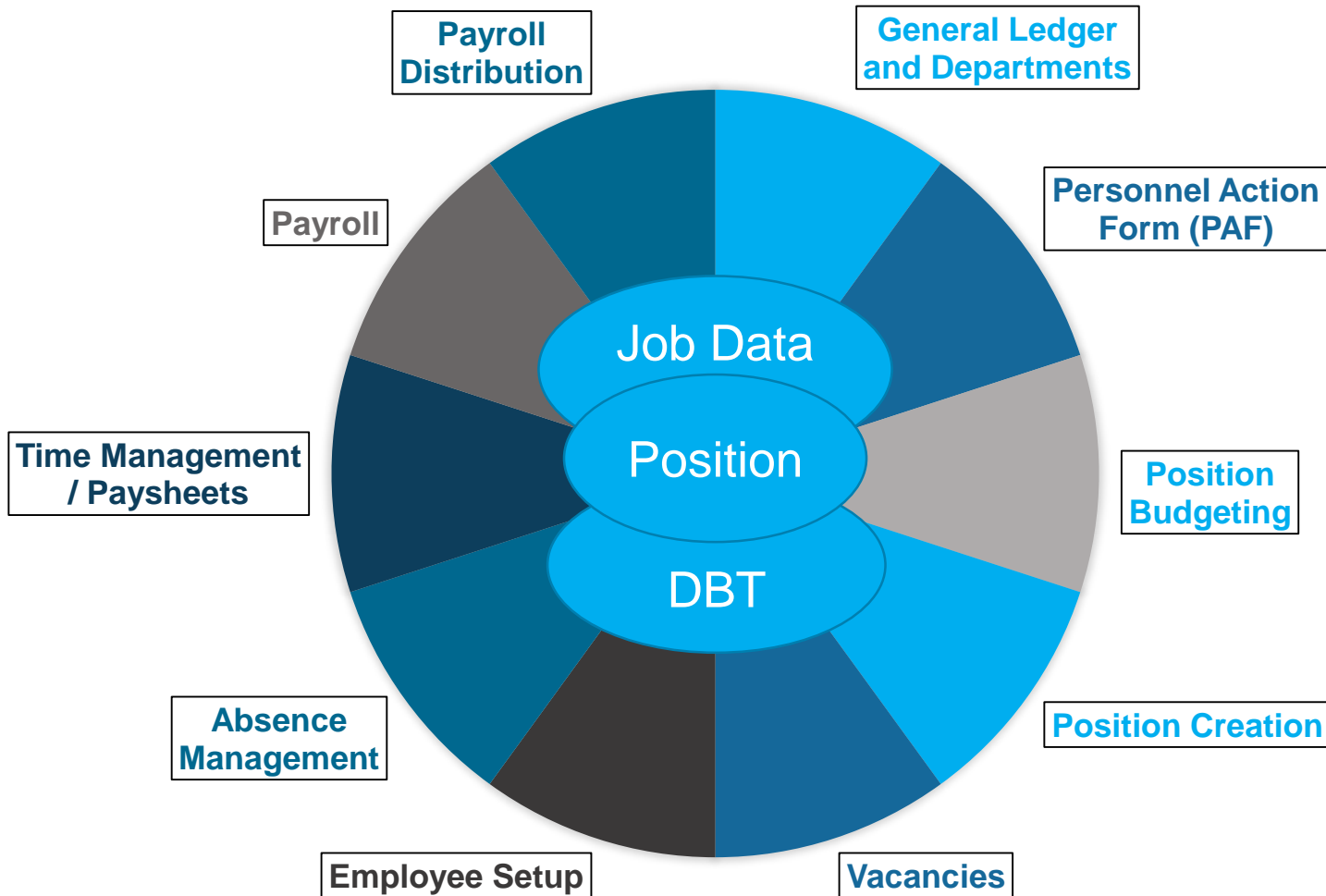
# Recruit to Pay With Future Projects

Red = Future Project



# Things To Consider

# POSITION CONTROL



Because Positions are bound to the funding of them (DBT) by the Department, it is critical that the Department number matches on the following 3 screens:

- **Position**
- **DBT**
- **Job Data**

This becomes especially important when making changes during year end and the upcoming fiscal year as this is when budgetary changes that affect reorganization of staffing and Position changes are most common.

# Things To Consider

## Department Changes

- New Departments
- Positions being assigned to different Departments

## New Positions

- New Board-approved Positions being established and staffed

## Funding Changes

- Updating chartstrings

## Staffing Changes

- New Hires
- Transfers



# Best Practices

## Planning

- Plan out the changes your district will be making.

## Communication

- Communicate upcoming changes across departments in your district.
- Example: Finance and HR

## Timing


- Decide when these changes will be made in relation to:
  - DBT rollover
  - Summer Months
  - Payroll


## Auditing


- Verify that the changes your district has made are complete and reflected correctly.

# 2019 to 2020 DBT Rollover

Tue 5/14/2019 9:36 AM

 Payroll Services  
2019-2020 DBT Rollover

To:  Payroll Services

 DBT Rollover Form 2019-2020.pdf  
118 KB

**PAYROLL/PERSONNEL SYSTEM E-MEMO – May 14, 2019**  
**From Payroll Services – San Diego County Office of Education**

To: Payroll Designated Representatives  
From: Payroll Services  
Re: Fiscal Year End Reminder – Department Budget Table Rollover

The County Office has the ability to generate a new annual budget for 2019-2020 by rolling over last year's budget information. Please fill in the attached form and return no later than **June 3, 2019**.

The Fiscal Year DBT Rollover Request form is a PDF fill in form that can be completed electronically and e-mailed directly back to Payroll Services by clicking the **Submit by Email** button on the top right side of the form after the form is completed.

Prior to any payrolls processing in the next fiscal year, the DBT tables must be setup to properly budget and expense the payroll wages. Districts

**Email from  
SDCOE  
Payroll  
Services  
sent 5/14/19**

SDCOE Payroll Services handles the DBT Rollover Process.

**June 3  
deadline**



## Things to Do Prior to the Rollover

The following items should be considered/addressed before rolling your Department Budget Tables to the next fiscal year (2019 -2020). Waiting to make these changes until after the rollover can cause unwanted and old data to carry over to next fiscal year.

- Know which data will roll.** All active DBTs roll. 2020 DBTs are created with the data from the most current row of the active 2019 DBTs and will all have an Effective Date of 07/01/2019.

**NOTE: Inactive DBTs will be excluded from the roll.**

- Clean up Departments.** Prior to the roll, plan out desired department changes on positions. Once you have confirmed what department the position is going from and to, follow the steps below to update the department correctly:

1. Decide what Effective Date you will use for the Department Change. Be sure to use Effective Dates in the current fiscal year so that the new DBTs are rolled. (In this example, Effective Date of 06/01/2019).
2. Inactivate the old DBT. Use an Effective Date of one day prior to the Department Change you plan to make. (In this example, Effective Date of 05/31/2019).
3. Change the Department on Position (In this example, Effective Date of 06/01/2019)
4. Verify that Job Data reflects the new Department.
5. Create the new DBT (In this example, Effective Date of 06/01/2019).

When your DBTs roll, the new DBTs with the updated departments will roll rather than the old (inactive) DBTs

**IMPORTANT! STEP 2 IS CRITICAL TO ENSURE THAT ONLY THE CURRENT (Active) DBTs ROLL.**

Critical step →



- ❑ **Decide when to roll.** Consider when would be best to run the rollover process. Rolling DBTs too soon can create added work for your organization because after your DBTs are rolled, you'll need to update *both* the 2019 and 2020 DBTs with your changes until next fiscal year.
- ❑ **Create new positions but be aware of how they are impacted by the rollover.** New Positions for next fiscal year can be created at any time but hold off on creating 2020 DBTs until after your district's DBTs are rolled.  
**NOTE:** If you create a position with a future Effective Date the DBT screen will consider that position as invalid until its Effective Date. You'll have to hold off creating the DBT until the Effective Date of the position is current or past.
- ❑ **Do not create DBTs for FY 2020.** Hold off on creating any 2020 DBTs until after the rollover process is run for your district. ***If 2020 DBTs are created prior to the rollover of 2019 DBTs, they will be overwritten.***
- ❑ **Clean up DBTs.** Update sequence numbers and remove MCOPs as they are not expensed separate from regular earnings.

### Things to Do After the Rollover

- ❑ **If you need to enter or update a position's DBT, update BOTH the 2019 and 2020 DBTs with your changes.** This ensures that the 2020 DBT data continues to mirror the 2019 DBT data.
  - If you need to enter or update a position's DBT for 2018-19 only, and not 2019- 20, make sure you only work with the record labeled 2019.
  - If you need to enter or update a position's DBT for 2019-20 only, and not 2018-19, make sure you only work with the record labeled 2020.
- ❑ **REMEMBER, EFFECTIVE DATES ARE CRITICAL.** When updating DBTs you must be conscious of the dates within each fiscal year and enter them accordingly. If an Effective Date from one fiscal year is entered in the DBT for different fiscal year, the earnings and fringes for the employee in that position will go to suspense.

To: Business Services, Matt Gilroy, Payroll Services, Room 503  
San Diego County Office of Education

From: Payroll Designated Representative  
[Redacted] School District

DBT Rollover to FISCAL YEAR 2019-2020

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Please roll the Department Budget Tables for 2019-2020 on:

- May 24:
- June 21:
- June 27:

07/01/19

# Special Considerations for Summer Months and Upcoming Monthly Payrolls

# Special Considerations

- **Special Consideration for Summer Months**
  - Short Work Break (SWB) affects 10 and 11 Month Employees.
  - Be sure to make changes to these employee's Positions and Job Data before or after the SWB rows are entered on Job Data.
- **Special Consideration for Upcoming Monthly Payrolls**
  - Be sure to complete changes prior to the Payroll calcs.
  - Audit your data to ensure your changes were done properly and are reflected throughout the various screens.
  - Communicate changes to other affected departments.

# Resources



# Queries

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## **M\_HR\_EE\_VALIDATION\_DIST\_PROMPT**

*This query provides data from various screens in HCM.*

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## **M\_JOB\_POSIT\_DBT\_DEPT\_MISMATCH**

*Department numbers that don't match across DBT, Position, and Job Data*

Department number must match on these 3 screens or earnings and fringes will go to suspense.

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## **M\_KK\_POSNS\_NO\_DBT\_2019**

*Positions missing a 2019 DBT*

To resolve this you must create a DBT for the Position or earnings and fringes will go to suspense.

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## **M\_DBT\_EARN\_TAB**

*Displays data from DBT Earnings tab*

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## **M\_HR\_POSITIONS\_FUTURE\_DT**

*Future dated changes that have been entered on Position*

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## **M\_AM\_ACCRUAL\_HRS\_FACTOR**

*Daily standard hours does not match daily Accrual Hrs Factor (affects Absence Management)*

Corrections are made by updating Accrual Hours Factor field in Job Data.

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## **M\_BETTERPEDR**

*The query that FIN personnel run after payroll distribution.*

Corrections are made in FIN through Journal entries with a source of PAJ.

## **Guides and Job Aids**

<http://crc.sdcoe.net/resources/peoplesoft/guides>

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**HR2 Position Management Guide**

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**HR5 DBT Guide**

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**2019-2020 DBT Rollover Document**

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