



Provost and Executive
Vice Chancellor
and
Vice Chancellor for
Finance and Business

Holladay Hall
Raleigh, NC 27695

April 13, 2015

MEMORANDUM

TO: Deans and Vice Chancellors

FROM: Warwick A. Arden, Provost and Executive Vice Chancellor
Charles D. Leffler, Vice Chancellor for Finance and Business

SUBJECT: Aligning the Position Budget in HR and the Salary Budget in Financials
for Budget Codes 16030, 16031 & 16032

We appreciate all of colleges' and divisions' efforts to clean up Position Control to better align the Position Budget in the HR System with the Salary Budget in the Financials System. This continues to be very important since Salary and Position data (salary base) that are submitted to UNC-General Administration, the Office of State Budget and Management, and the Fiscal Research Division are used for various projections, reports and legislative ad hoc requests.

We realize there are challenges with having enough permanent budget to cover all current SPA and EPA permanent positions. However, we need to continue to monitor and clean up differences on an on-going basis. As part of the fiscal year-end process, special focus is needed on reserve clean-up for July 1, 2015.

Effective July 1, 2015, the following are required:

- 1. Permanent funding must be budgeted for all permanent SPA and EPA positions, recognizing that 51310 (EPA Teaching) budget provides funding for other salary lines in some cases.**
- 2. Use new Position Control High-Level Summary reports to identify differences between HR and Financial budget and identify areas that need attention. These new reports have been developed in the upgraded Position Control Application that is now in PeopleSoft HR and for which training is in progress.**
- 3. Create "pooled-reserve" positions in HR for housing multiple FTE in 51310 for the purpose of funding graduate teaching assistances and per course faculty, which will need to correspond to the 51310 salary budget dollars and FTE in Financials. See attached process on Creation of Pooled Reserve Positions.**

We will be receiving high-level summary status reports from the Budget Office periodically on the differences between the HR and Financial budgets. Your continued assistance and compliance is greatly appreciated. Please contact your Budget Analyst with Position Control questions and contact Todd Driver in HR or Millie Britt in the Budget Office with questions on creation of pooled positions.

cc: Steve Keto, Associate Vice Chancellor for Finance and Resource Management
Barbara Carroll, Associate Vice Chancellor for Human Resources
Barbara Moses, University Budget Director
Todd Driver, Director, HR Information Management
College & Divisional Leads

Attachment

Creation of Pooled Reserve Positions
for
Aligning the Position Budget in HR and the Salary Budget in Financials
For Budget Codes 16030, 16031 & 16032
Effective July 1, 2015

1. HR will create pooled reserve positions for each job code per academic department needed by college/division (college/division does not have to load in PeopleAdmin):
 - a. Graduate Teaching Assistants (Job Code A138)
 - b. Graduate Teaching and Research Assistants (Job Code A178)
 - c. Todd Driver will provide a proposed list to the UBO's within 10 days of the date of the memo, and they will let Todd know if they concur with the list.

2. College/Division updates Position data:
 - a. Add action reason FSB (Change FTE, No Benefit Impact)
 - b. Change "Shared FTE" field to reflect total FTE being funded by position.
 - c. Change "Standard Hours" to calculate FTE appropriate for one incumbent.

3. College/Division adds or updates Position Budget Amount and Distribution to reflect total budget for all grads being funded by position.
 - a. Use View Position Budget & Incumbent Information link at bottom of Add/Update Position Info or use Distribution Setup option under Commitment Accounting.
 - b. Add row with appropriate effective date to add/update Position Budget Amount and Distribution. Choose override account of 51319 and/or 51119 as appropriate.
 - c. Position Amount and Shared FTE will show in Position Control reports.

4. College/Division can setup grads as work against on Distribution Setup if they choose:
 - a. Add row, change date, enter comments, check work against box, enter/select pooled position number, and change employee distribution as appropriate.
 - b. On HR Assignment details in Position Control, the grad will be listed and have "Yes" under "W/A" column. However, it will not show position number since grad is not in the position on job appointment.
 - c. Pooled position will be considered vacant and show up on Vacant Position Reports; however, it will have "Y" under Temp W/A Dist Setup column to indicate a temp or grad is set up on Distribution Setup as work against the vacant position. Note: We can exclude the vacant position from being reported to UNC-General Administration based on the current guidelines if the funding is being used for the purpose of graduate assistants, temps or adjunct faculty working against the positions.
 - d. Grads setup as work against are also listed on Budget and Funding Incumbents tab of Position Budget.

5. College/Division updates pooled positions Shared FTE, budget/distribution, and work against information (as noted above) as needed going forward.