



# Wesleyan University: Position Budgeting Training

# ALWAYS PLAN AHEAD!

Plan ahead either with your department chair or appropriate faculty to determine the following:

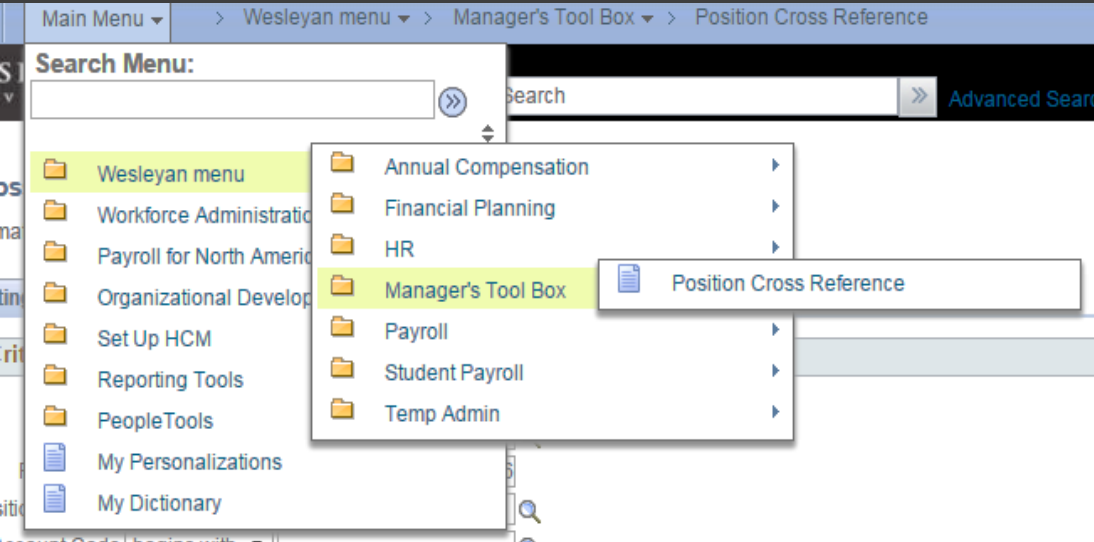
- How many student workers/course assistants are needed for the semester?
- How many hours are needed for this semester?
- What is the over all budget needed to accommodate the amount of students and the hours needed?
  - Student Workers
  - Course Assistants
    - \* Both must be separate
- How many students will be work study?

Once this information is determined, you will then proceed to the HRMS Database

- This is where the correct position number will be located and used for processes
- This is where all payroll is entered for student workers and course assistants
- This is also where payroll can be tracked and used for reporting

# Position Numbers/Position Cross Reference

Main Menu->Wesleyan menu->Manager's Tool Box->Position Cross Reference



## What are position numbers?

- Position numbers are numbers that are attached to a smartkey that are used to process payroll.
- For Students, one position number can be used for multiple students.
- Depending on the type of student employment, will determine which smartkey they will be paid from.
  - Ex: student workers will be paid from the student worker position number and smartkey and course assistants will be paid from the course assistant position number and smartkey

**Please verify the type of student employment for each student.**

- Ex: Student Workers/Course Assistants

## What is Position Cross Reference?

-This is where the appropriate position number will be selected so that payroll can be charged to the correct smartkey.

**Verify the Commitment Accounting of a Position Number before assigning it to an Employee.**

# Position Cross Reference

**Position Cross Reference**

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ **Search Criteria**

Set ID = ▼ WSLYN 🔍

Fiscal Year = ▼ 2016

Position Number begins with ▼ 🔍

Account Code begins with ▼ 🔍

Empl ID begins with ▼

Empl Record = ▼

Name begins with ▼

Department contains ▼ 1095 🔍

Short Description begins with ▼

Long Description begins with ▼

Classified/Unclassified Ind = ▼

Case Sensitive

## Finding Positions:

- Go to Position Cross Reference in HRMS
- Enter in the department number to find the correct the position number-**click search-**
- Find the correct student employee position number
- Verify the position number by the Account Code
  - **Position number-smartkey-account code**
  - Verify the smartkey and account code ex: 81630
- Once verified, use the position number to process payroll

**Search Results**

View All First 1-13 of 13 Last

Set ID	Fiscal Year	Position Number	Account Code	Empl ID	Empl Record	Name	Department	Short Description	Long Description	Classified/Unclassified Ind
WSLYN	2016	12252	12252-1001095100-81630	(blank)	0	Vacant	1095	Student	Student Employee	Student

## Requesting a New Position:

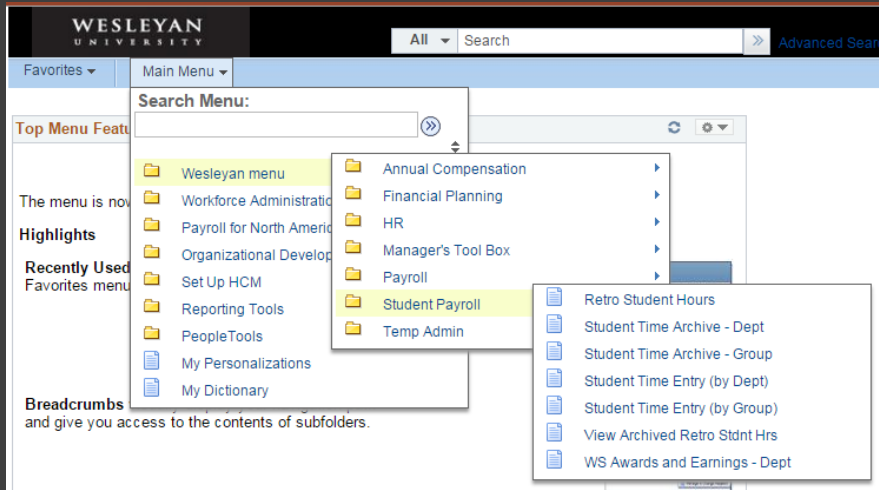
If a position number does not exist for the title and/or funding source, please request for a new position number.

For Student Position numbers - click on link for "New Student Position Form" under Human Resources Forms in WesPortal – Employee Information

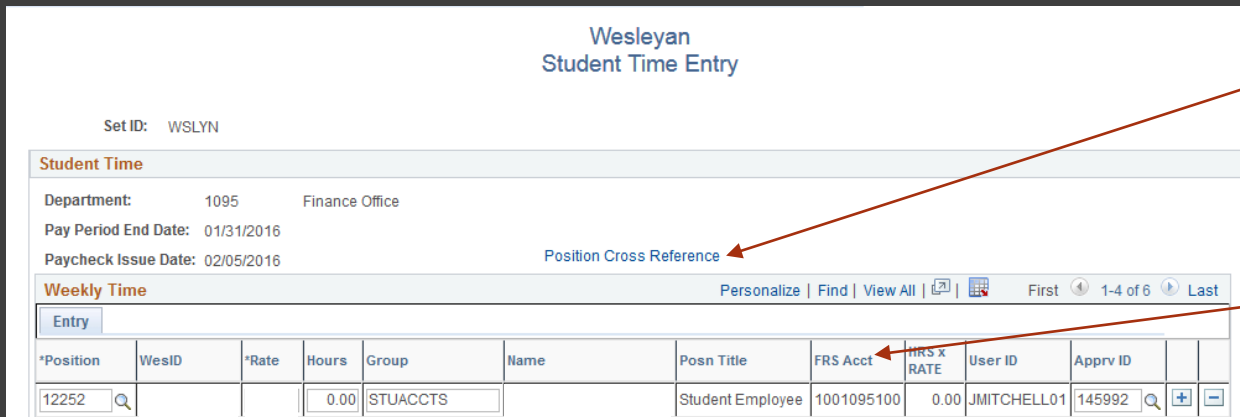
For Temporary Positions numbers - click on link for "Temporary Help Request Form" under Human Resources Forms in WesPortal – Employee Information

*Please note the department for the position should match the department number in the smartkey*

# Position Cross Reference



Main Menu-Wesleyan menu-Student Payroll-Student Time Entry (by Dept)



To verify if the correct position is being entered, click on the Position Cross Reference.

This is another way to access Position Cross Reference and to verify that the correct position number is being entered for payroll.

Also note that the FRS Acct where the smartkey will appear which indicates that this is where the payroll will be charged too.

## *Position Commitment Accounting Change*

***For changes in commitment accounting, click on the link for “Position Commitment Accounting Change” under Finance in the WesPortal.***

### **Student Positions**

- Unrestricted Funded (Smartkeys that begin with 1) – Change in commitment accounting is not allowed. If the funding source has changed or needs to be changed please request a new position number.

### **Temporary Positions**

- Unrestricted Funded (Smartkeys that begin with 1) Change in commitment accounting is not allowed. If the funding source has changed or needs to be changed please request a new position number.

### **Staff Positions**

- Unrestricted Funded (Smartkeys that begin with 1)– Centrally Managed

***Changes in commitment accounting will affect future payrolls only.***

*If you need to correct past payrolls please submit an earnings redistribution form by clicking the link for “Earnings redistribution Request” under Finance in WesPortal. This can only be done for the past 90 days.*

# *Earnings Redistributions*

## ***Earnings Redistribution Request:***

Earnings Redistribution Request under ***Forms*** in Eportfolio

### ***What is Earnings Redistribution Request?***

Move payroll related transactions to the appropriate position, smartkey or account. Redistributions must be requested within 90 days of the original payroll.

Fix wrong position number used to pay student.

Fix wrong smartkey used to pay employee from operating to a grant.

**This should be the last resort when processing payroll.**

**It is necessary to track and manage payroll to avoid multiple earnings redistribution and to stay within budget.**

**Note: If Student is Work Study eligible, once the earnings hits the system, it automatically redistributes earnings in 81630 to account 81610 with 50% to department smartkey and 50% to work study smartkey. If you need to correct the smartkey or position number you will need to submit a Non-Standard Redistribution Spreadsheet, located on the bottom of the Earnings Redistribution Request Form.**



# Earnings Redistribution Request


candrews01 Redistribution Forms

[Create Form](#) [View Forms](#) [Process Forms](#) [Forms Inquiry](#)

**Welcome**

This form should be used to request redistributions of earnings to correct position or accounting information. You will be limited to positions and accounts that you have security access to. Only earnings from the last 90 days are eligible for redistribution. If you have any questions, please contact Chris Andrews at x3153 or candrews01@wesleyan.edu.

**Earnings Redistribution Criteria:**

▪ Position Number (required):   \*\* Click ICON to Search by Title

Fiscal Year	<input type="text"/>	<input type="text"/>
EMPLID	<input type="text"/>	<input type="text"/>
Name	LIKE <input type="text"/>	<input type="text"/>
Account Number	<input type="text"/>	<input type="text"/>
Object Code	<input type="text"/>	<input type="text"/>
Pay End Date (DD-MON-YYYY)	<input type="text"/>	<input type="text"/>
Pay End Date (DD-MON-YYYY)	<input type="text"/>	<input type="text"/>
Check Date (DD-MON-YYYY)	<input type="text"/>	<input type="text"/>
Check Date (DD-MON-YYYY)	<input type="text"/>	<input type="text"/>

Note: Use UPPERCASE letters when entering parameter values.

**Note:**

If you need to request a redistribution to or from a position or account which you do not have security access to, please complete this spreadsheet:

[Non-Standard Redistribution Spreadsheet](#)

Done Internet 100%

**Note: Please use three or less of the parameters when entering the information needed to continue with this request.**

**The easiest criteria to enter is EMPLID, SMARTKEY and POSITION.**

**Entering too much information into the parameters can cause the system to be able to run successfully.**

**If you do not have access to a smartkey that you need to redistribution earnings to and from, please submit an offline Redistribution Form at the bottom of the screen.**

# Earnings Redistribution Request

candrews01 Redistribution Forms

Create Form | View Forms | Process Forms | Forms Inquiry

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**Redistribution Request Form**

FROM  
Position Nbr: 12252 - Student Employee  
Dept: 1095 - Finance Office

**Enter Redistribution Information:**

TO

\* Position Nbr:

\* Acct:

\* Obj Code: %

**Redistribution Reason**

\* Reason:

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UserID=772139 UserName=candrews01 Version:2008.08.26

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Done Internet 100%

- 1) Verify that the position information that you wish to redistribute from is correct.
- 2) Enter the position number and accounting that you would like to redistribute the earnings to. You will have access to Positions and Accounts within your security. Click on the icons to search by position and account.
- 3) Enter a reason for the redistribution. The reason will later be displayed on the earnings report in Inquiry.
- 4) Click "NEXT"

# Earnings Redistribution Request

Create Form | View Forms | Process Forms | Forms Inquiry

Redistribution Request Form

[SUBMIT All Redistributions](#) [CANCEL All Redistributions](#)

FROM  
Position Nbr: 12252 - Student Employee  
Dept: 1095 - Finance Office

Enter Redistribution Information:

TO  
 \* Position Nbr:  Student Employee  
 \* Acct:  HUMAN RESOURCES SAL  
 \* Obj Code:    
 Dept:  Human Resources Department

Warning - Account and Obj Code do not match the current commitment accounting for this position.

Redistribution Reason  
 \* Reason:

Earnings Redistribution Workarea

	Fiscal Year	Redist Amount	Pay End Date	Amount Available	Emplid	Name	Position Nbr	Position Title	Account Number	Acct Descr	Object Code	Obj Code Descr	Check Date	Earnings Code	Earn Cd Descr
<a href="#">Edit Amt</a> <a href="#">Delete Row</a>	2009	69.70	06-JUL-08	69.7	Student		12252	Student Employee	888888	FINANCE	1610	WORK STUDY ACAD YR	11-JUL-08	STU	Stud Reg
<a href="#">Edit Amt</a> <a href="#">Delete Row</a>	2009	121.12	13-JUL-08	121.12	Student		12252	Student Employee	888888	FINANCE	1610	WORK STUDY ACAD YR	18-JUL-08	STU	Stud Reg
<a href="#">Edit Amt</a> <a href="#">Delete Row</a>	2009	80.76	20-JUL-08	80.76	Student		12252	Student Employee	888888	FINANCE	1610	WORK STUDY ACAD YR	26-JUL-08	STU	Stud Reg
<a href="#">Edit Amt</a> <a href="#">Delete Row</a>	2009	93.60	27-JUL-08	93.6	Student		12252	Student Employee	888888	FINANCE	1610	WORK STUDY ACAD YR	01-AUG-08	STU	Stud Reg
<a href="#">Edit Amt</a> <a href="#">Delete Row</a>	2009	104.12	03-AUG-08	104.12	Student		12252	Student Employee	888888	FINANCE	1610	WORK STUDY ACAD YR	08-AUG-08	STU	Stud Reg

Done

Internet 90%

- 1) Verify the position and account information that you wish to redistribute to is correct. A warning will be displayed if the accounting that you have entered does not match the commitment accounting for the position. Complete a Commitment Accounting Change form if necessary.
- 2) In the Earnings Redistribution Workarea all of the earnings rows that are eligible for redistribution will be displayed.
- 3) To delete a row entirely, click on **Delete Row**
- 4) To edit the redistribution amount for a row, click on **Edit Amt**