

NextGen Position Control

Overview

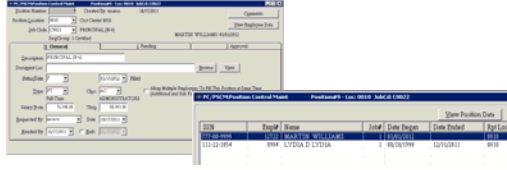
11.30.2015

Objectives of Position Control

- Ensure that all Employees are Assigned to Authorized and Funded Positions
- Streamline Workflow Between HR and PR
- Eliminate Redundant Data Input
- Support Checks & Balances Between Departments
- Historical Views of Positions and Employee Assignments
- Track Vacant and Filled Positions
- Optional Budget Checking Based on FTE Allocations
- Optional Board Agenda Reporting
- Optional Approval Process for New Positions

Position Control Basics – Master Position

- Master Positions are Defined by:
 - Location (Where)
 - Job Code (What)
 - GL Account and FTE (How Many) Budgeted Salary (How Much)
- History Displayed for Employees Assigned to the Position



Position Control Basics – PR Interface

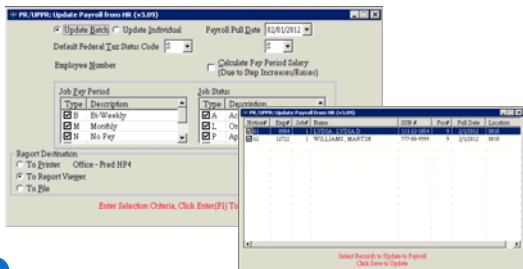
PR Department

- PR Receives the Pending Personnel Action Forms (PAFs) from HR
- PR Reviews PAFs to the 'Pull' (Update) and May Contact HR Regarding Questions or Concerns
- PAFs are Updated by PR at the Appropriate Time (Based on the PR Processing Schedule)
 - Typically, Terminations are 'Pulled' in Early September After the Final August Payment
 - Typically, New Hires are 'Pulled' in Early August or September Prior to the Employee's First Payment
- PR Completes Any Missing Employee Information, Including the Pay Period Salary

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Position Control Basics – PR Interface

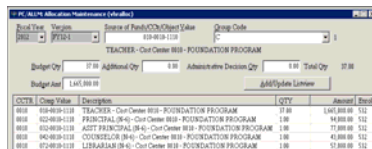
Update Payroll from HR (PR Pull)



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Optional PC Component – Budget Checking

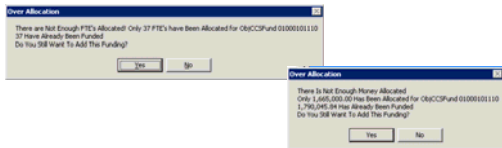
- Allocations for Budget Checking:
 - Cost Center (Where)
 - Object Code (What)
 - Funding Source (Foundation, Federal, Local, etc.)
 - Total FTE (How Many)
 - Total Salary Budget (How Much)
 - CCTR Enrollment
- Import Available



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Optional PC Component – Budget Checking

- Budget Checking Options
 - Restrict User Exceeding FTE Allocation
 - Warn User Exceeding FTE Allocation
 - Restrict User Exceeding Budget Amt
 - Warn User Exceeding Budget Amt



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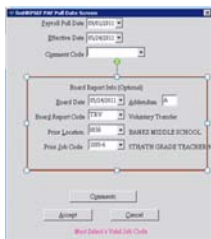
Optional PC Component – Board Reporting

- **School Board Members** are frequently asked to approve personnel change requests submitted by Central Office and the schools in their jurisdiction. These requests include any number of personnel actions including employee hires, terminations, and salary changes. Generally, the Board Agenda Report is produced 'manually' by the Human Resources Department, which can be a time-consuming task.
- The **Board Agenda Reporting** module may be used to generate the Board Meeting Agenda using the existing Personnel Actions in the Position Control System, therefore freeing up valuable resources. In today's environment, where School Systems are being asked to do 'more with less', automation of clerical tasks is essential.

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Optional PC Component – Board Reporting

- Report Pending Personnel Actions by:
 - Board Action Type (Assignment, Retirement, Voluntary Transfer, etc.)
 - Board Meeting Date
 - Comments
 - Addendum (Optional)



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Optional PC Component – Board Reporting

- Flexible Board Agenda Reporting and Customized Board Agenda Report using Crystal

EMPLOYEE NAME	SCHOOL	POSITION
0-0001	JONESTOWN MIDDLE SCHOOL	SECONDARY PRINCIPAL
0-0002	WISN HILLS ACADEMY	TEACHER
0-0003	WISN HILLS ACADEMY	TEACHER
0-0004	WISN HILLS ACADEMY	TEACHER
0-0005	WISN HILLS ACADEMY	TEACHER
0-0006	WISN HILLS ACADEMY	TEACHER
0-0007	WISN HILLS ACADEMY	TEACHER

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Optional PC Component – Approval Process

- Approval Processing for New Positions:
 - Approver (Person or Department)
 - Date Reviewed
 - Approval (Yes or No)
- Position Remains Unapproved (Cannot Fill) Until Final Approval
- Strongly Suggest Budget Department be Included as Approver

Code	Description	Date Reviewed	Approved	User Approved
DHD	Department Head	2/10/2012	Yes	Director of Human Resources
DHR	Director of Human Resources		No	
DIP	Independent		No	

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Popular Position Control Reports & Queries

- Position Control Report and Query
- Position Control Action Form
- PAF Edit Report
- Board Agenda Report
- Superintendent's Report
- Assigned Positions by Allocation
- Allocation Projections Report
- Active Personnel Distribution Report

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