PeopleSync Newsletter: Issue 23

In this issue:

- Tips and Best Practices on Hiring
- Changes in PeopleSync to Costing Allocations and Chartfields (US Only)
- AMI Reminders (US Only)
- Managing the Job Change and Hire Process Between Schools
- Reason Field Moved in Request Compensation Change
- New Academic Edit Position Reasons
- PeopleSync Error Alerts – Student Hourly Job Profiles (US Only)
- PeopleSync Tips – What to Do with To-Dos
- Ticket Spotlight – Conflicting transactions – Edit Position Restrictions (US Only), Title Fields in Hire or Job Change

Tips and Best Practices on Hiring

In preparation for AY2020, we've compiled a list of past articles and Ticket Spotlights which address common questions on hiring and reappointing. Please take a moment to review these topics including I-9 reverification, onboarding tasks, initiating a rehire, and extensions.

General Hiring

- Ticket Spotlight: I-9 Reverification (US Only)
- Ticket Spotlight: Uploading an I-9 document (US Only)
- Ticket Spotlight: Routing New Hire Onboarding Tasks (US Only)
- Ticket Spotlight: Duplicate Applicant Records (US Only)
- Troubleshooting Hire and Job Change Transactions in Position Management
- How to Rehire a Terminated Employee

Full Time Faculty and Part Time Faculty (Adjuncts)

- How to Complete the Annual Work and Disbursement Period Fields (US Only)
- Place FT Faculty on Reduced Pay Leave (US Only)
- Best Practices for Assigning Courses to Adjuncts (US Only)

Student Hiring

- Completing the Job Classification Field for Student Hourly Jobs and Updated Grad Student Tip Sheet (US Only)
- Ticket Spotlight: Hiring a Student into a FT Position/Job
- Hiring a Graduate Student Who Has Graduated

Fixed Term Jobs and Extensions/Ending Jobs

Dual Employment, Agency Temps, Casual Employees, Retirees

For Initiators of Transactions:

Changes in PeopleSync to Costing Allocations and Chartfields (US Only)

Following are upcoming changes related to Costing Allocations (override or default) in PeopleSync effective September 1, 2019:

1. Costing Override Transactions (*Assign Costing Allocation* task)

All costing override transactions completed via Assign Costing Allocation (whether launched manually or as part of another business process like Hire, Add Job) will be checked against FAME for valid chartfield combinations. If any of the chartfield combinations are invalid, the costing override transaction will be rescinded and the transaction initiator and approver will be notified via email from 'NYU PeopleSync IT <nyu347@nyu.edu>'.

If the transaction is rescinded, the intended changes will not be captured in PeopleSync and the transaction must be re-submitted. If the chartfield combination is valid, the transaction will proceed.

2. Restriction on the usage of NYU Shanghai Funds on Costing Override Transactions (*Assign Costing Allocation* task)

Usage of NYU Shanghai Fund 10 is now *NOT ALLOWED* with non-NYU Shanghai Business Units. While submitting costing override transactions, if you select WSQ Business Units and NYU Shanghai Funds and click on Submit, you will receive an error in PeopleSync stating the following:

You've selected an invalid Business Unit and Fund combination. Please note that when selecting a non-NYU Shanghai Business Unit, you cannot also select an NYU Shanghai fund. Please revise your selection and resubmit.

You will not be able to proceed until you have selected a proper Business Unit and Fund.

3. Restriction on the usage of WSQ Fund 24 and Fund 25 on Default Costing (*Change Organization Assignments* task)

Use of WSQ Funds 24 and 25 is *NOT ALLOWED* in default costing (organization assignments) for all employees except hourly students.

If you select WSQ Funds 24 or 25 in the Assign Organizations step in a Hire/Add Job process or in a Change Organization Assignments task, and click on Submit, you will receive an error in PeopleSync stating the following:

Fund: WSQ01-24-Foundation and Non-Federal Grant and Fund: WSQ01-25-Gov't and Coml. Grants/Contracts are not valid selections.

You will not be able to proceed until the Fund is changed to other than 24 or 25.

Note: This restriction does not apply to hourly students.

If you have any questions, please contact FinanceLink at askfinancelink@nyu.edu.

AMI Reminders (US Only)

We recently completed testing of the AMI letters on August 23rd and thank those who participated in the review process. As a reminder, AMI letters will be available to Administrative/Professional population (as applicable) on August 29th.

See HR Community's *FY2020 Annual Compensation Program* web page for key dates, guidelines, presentations, deadlines, FAQs, and more.

Managing the Job Change and Hiring Process <u>Between</u> Schools

Below are guidelines for processing a job change or hire between schools.

Job Change > Request Transfer. If the employee is transferring from one school to another, use the Job Change transaction. In this case, the school which the employee is *transferring into* will initiate a **Job Change > Request Transfer.**
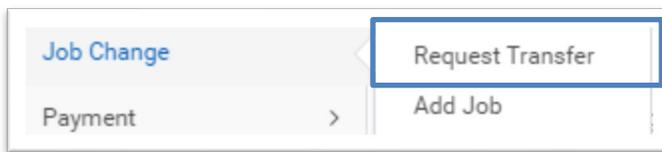
The transaction will first route to HR at the school that the employee *is leaving* for approval. Next, the hiring school completes the remaining steps in the Job Change.

(Tip! In PeopleSync, the position that the employee is transferring into is referred to as the "Inbound" position; the position the employee is leaving is the "Outbound" position. When a job transaction completes you can see this terminology applied in the Worker History.)

Termination to Rehire. In some scenarios, an employee must be terminated first prior to hire. *This is typically when the employee's benefits status and Hire Date must be reset.* An example is a student who is being hired into a Union Staff position or an adjunct who is being hired into a FT Faculty position. In both cases, the record is terminated first and then the employee is rehired into the new position.

When this transaction is occurring *between* schools, the school that is hiring the employee should review the current record. If it is NOT terminated yet, contact that school so that they can take the appropriate action. i.e. end jobs or terminate the record. Here are two examples:

- Harry Potter is a student who has a FWS job at School A which ended on May 15. He is graduating; School B will hire him into a FT admin aide job starting June 1. In his record in PeopleSync, his student job is still active. School B should contact School A and request that they end and terminate the record. School B can then process the rehire. (Note: if the non-primary job is a student stipend, contact PeopleLink).

- Draco Malfoy is an adjunct who worked at School A during the Spring of 2019; School B will hire Draco into a FT faculty position on 9/1. His record is still active in PeopleSync. School B should request that School A terminate the record. School B can then process the rehire.

Once the record is terminated, the hiring school should select the sup org that the employee will work in and select ACTIONs > Hire > Hire Employee > **Existing Applicant.**

Tips!

- The most common error is to try to initiate the action from the *employee's record*; you will not see the hire transaction available there. Instead, select the Sup Org.

- Schools should coordinate the effective dates of the termination and hire transactions. i.e. the hiring school should convey the hire date. The end job or termination dates must be before the hire date.

Reason Field Moved in Request Compensation Change

As part of the workday 33 upgrade (effective Sept 9th), the Request Compensation Change *Reason field* has been moved from the first to the second page transaction. (See image to the left).

If you forget to select the reason, the transaction will display an alert and prevent submission.

Types of reason and functionality remain the same.

New Academic Edit Position Reasons

In an effort to better classify our transactions for *Academic* employees, we have added two new reasons to the **Edit Position** transaction:

Modify Incumbent > Academic Title Change. Select this reason when modifying the job profile and title fields for FT and PT Faculty, Professional Researchers, Post Doc Fellows, etc.

(Note that the current Title Change reason is used for Administrative and Staff positions.)

Modify Incumbent > Academic Pay Change. Select this reason when modifying the Annual Work Period or Disbursement Plan Period fields for *FT Faculty*.

PeopleSync Error Alerts: Student Hourly Job Profiles (US Only)

"This employee is Graduate Student Union eligible, please select an eligible job profile." Or "This student is not eligible for the Graduate Employee Union job profiles. Please contact "askpeoplelink@nyu.edu", for further assistance."

For this month's Error Alert column, we review the validation errors above which may appear when appointing student hourly positions. Student hourly job profiles are divided into two categories based on eligibility for Local 2110.

STNT01, 02, 03 – use for Undergraduates, Graduates who are not eligible for Local 2110.

STNT05, 06 – use for Graduates who are eligible for Local 2110

In the Add Job transaction PeopleSync checks if the student is eligible for hourly job profile. Here are three examples of when you may encounter the error message:

- Ginny Weasley is an Undergraduate Student. The job profile entered is STNT06. The user must change the job profile to STNT01, 02 or 03.

- Pansy Parkinson is a Graduate student enrolled in the MBA program at Stern. The job profile entered is STNT05. The user must change the job profile to STNT01,02, or 03.

- Alastor Moody is a Graduate Student at FAS. His BUE Flag for the summer '19 is **No.** The job profile entered is STNT06 and the dates of the job are June 10 to July 31. The user must change the job profile to STNT01, 02 or 03.

The initiator cannot move forward with the transaction until this job profile is changed. To review the eligibility of the student refer to the Job > Personal IDs tab. If the student is an Undergrad or a Grad student who attends a non BUE school or program there will be no BUE SIS flags. If the student is a Graduate student in a bargaining unit eligible school you will see a list of three semesters and Y (yes) or N (no) indicating eligibility for Local 2110.

Refer to the *Hire Graduate Employee Tip Sheet* for a list of schools/programs excluded from Local 2110 and an overview of the BUE SIS flags.

PeopleSync Tips: What to Do with To-Dos?

If you submit transactions you may be familiar with "To-Dos". A to-do appears in your inbox after a transaction has completed. It is reminder of an action to take after the business process/transaction has completed. It is an important part of the process but may be submitted after the transaction has completed. Some to-dos are completed outside of the system.

Here are a few examples:

Add Education Information: This appears after you complete a Hire. It reminds the initiator of the hire transaction to complete the employee's education information.

Consider Roles to Assign Worker: This appears after a completed Job Change. It is sent to the Security Administrator of the School or admin unit. It is the opportunity to update the employee's roles in PeopleSync.

Records Submission for Data Change. This appears after submitting a change to a legal name, date of birth, citizenship etc. It is a reminder you to provide the proper acceptable documentation for the change.

The To-Do is a reminder but it not required to complete a transaction. **As it is a part of the business process, we do recommend that you act on the to-do.**

Note: A To-Do remains in your inbox until you Submit the To-Do.

Ticket Spotlight:

Q: I am trying to process an Edit Position in JDX but I received an email that the transaction cannot be processed. (US Only)

The Edit Position transaction in JDX initiates an edit position restrictions (or change to the position/seat's data). However, this transaction cannot complete* if there is an Open Requisition or an in-progress Job Change/Transfer on the position in PeopleSync.

To avoid delays prior to submitting the Edit Position in JDX*, navigate to the position in PeopleSync:

- To close a Job Requisition, Select Actions > Job Change > Close Requisition.

- To check if there is an in-progress Job Change, navigate to the position. Select the *link* next to Position Restrictions. (Example Position Restrictions 1000000 Senior Manager – Smith, Kate). Select the Business Process History. From here, you can review any in-progress transactions.

*Note: You will still be able to submit the transaction in JDX but will receive an email or response in a ticket if there is a conflicting transaction.

Q: I processed a Job Change for an Administrative/Professional and the title is wrong? How did this happen?

When hiring, changing or editing a position, you will see the Job Profile and Title Fields.

The Job and Business Title fields **automatically prepopulates to match the title of the Job Profile.** However, *these fields may be edited as needed. (See image).*

An alert – *"The Job Profile, Business and Job Titles all match. If this is not correct please update the Business Title before submitting"* – has been added to the following transactions: Hire, Change Job,

Add Job, and Edit Job. This is a soft alert and is not a hard stop. The transaction may still be submitted without editing the fields.

(Note: The title should match the title that is listed in the position/seat. To find the title in the position/seat, enter position # into PeopleSync. Select this link. Next select the link next to Position Restrictions. This is the title that was reviewed by Compensation Team. If you need to change the title in the seat, process an edit position in JDX.)