Scenario: Move Employee into an Overlap Position (Staff)

When to use

Overlap positions are created in the following circumstances (assuming, funding supports the overlap):

- When there is a need for an outgoing employee to train an incoming employee
- When an outgoing employee's date of departure is *after* the start date of the incoming employee hired to fill the position
- When the position needs to be maintained for posting *without* changing the current employee's record

  Note: If making changes to the position, check with HR Compensation (hrcomp@bu.edu) if a temporary overlap position is necessary based on the situation.

Overlap positions are temporary in nature and must be delimited once the current employee vacates the position. This means a new temporary overlap position must always be created, even if one was created in prior years.

Warning: When the original position is copied to create the temporary overlap position, the overlap position will *not* have the same security roles as the original position (*e.g.*, Manager Self-Service, Payroll Coordinator, etc.) If the security roles are still needed for the current employee, your department DSA will need to request the appropriate roles be added to the overlap position. Please plan accordingly.

Order of operations

The process for temporary overlap positions needs to follow a specific order. This order will prevent delays and minimize disruptions to your employees:

1) Maintain the current position to post.
2) Create the temporary overlap position.
3) Submit a Position Change form to move the **current employee** into the temporary overlap position (instructions below).

   Warning: The corresponding Position Change form must be completed *after* the Create Position form successfully completes workflow. **OM and PA forms cannot be completed simultaneously.**

4) The incoming employee is hired into the original position. For employees who are not currently in SAP, the Hire form will be processed by HR Talent Recruitment Services. For employees who are currently in SAP, the Position Change or Transfer form needs to be completed, depending on the situation.

5) Once the Position Change form completes workflow, process the Termination or Retirement form for the outgoing employee.

   Warning: Do not process the Termination form until the current employee is moved into the overlap position. If the Termination form was already processed, and the employee has not yet been moved into the overlap position, submit a ticket to HR Information Systems (hrsys@bu.edu) requesting the Termination action be reversed. Include the employee's name, BU ID, and the tracking number of the Termination action. The Termination action can be reprocessed after the employee moves into the overlap position.

6) Once the outgoing employee vacates the temporary overlap position, delimit the overlap position.

Before you begin

Ensure the requisite request to create an overlap position has been submitted and approved *before* submitting the personnel administration form. See the BUworks Form Decision Guide for a complete list of forms necessary for each action type.

Collect all information needed to complete the form. The in progress form cannot be saved and must be completed in a single session. You will need the following information:

- Effective date the employee will need to be moved into the overlap position (choose a date prior to the new employee's start date)
- Position number of the overlap position
- Percent time
- Salary amount

Incorrect information will result in longer processing times and may cause your form to be rejected. OM forms can only be rejected by HR Compensation and Budget; they cannot be returned.

To prevent late payment to an employee, pay careful attention to the form deadlines and plan accordingly.

References

- Click here for the Data Dictionary
- Click here for the OM and PA form deadlines.

Move Employee into an Overlap Position (Staff): Step-by-Step

Step	Action
1	Initiate the **Position Change** form. ***Reference:*** Initiate a Personnel Administration (PA) Form
2	Enter the effective date for the position change in the **Position Change Effective Date** field in mm/dd/yyyy format. If preferred, click the **Calendar Lookup** icon to select the effective date of hire from the calendar. ***Note:*** If the salary is changing, the salary will be pro-rated based on the effective date used. ***Warning:*** To avoid potential delays in payment to the employee, take note of the assigned PA deadline for the intended pay period and plan accordingly.
3	Click the **Continue Editing Form** button. ***Result:*** • The **Employee Information as of** section is populated with the employee's information as of the effective date used. • The **Updated Employee Information** section describes the new employee information. • The **Attachments** and **Comments** sections of the form appear.
4	Select the **Action Reason** "Lateral" from the dropdown menu.
5	Review the **Updated Employee** Information section. If the information is correct, proceed to the next step. If the information is *not* correct: • Using the Request Tracker, confirm the OM form submitted for this action completed workflow ***Note:*** A form status of Wait4Payroll or Correction means the form did not complete workflow. The Status must display "Completed". • Check to make sure the effective date used is the same as, or later than, the effective date used on the corresponding OM form If the above do not resolve the issue, cease processing and contact HR Compensation (hrcomp@bu.edu) for guidance. Include details of what you checked and the corresponding OM tracking number from the Request Tracker.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Select the employee's new position from the New Position dropdown menu.

Note: If the position number does not appear in the dropdown, confirm the position is open by reviewing the maintain position form under ‘Position Details’. If the position is marked as No/Remove recruitment or hire selection, process a Maintain Position form to open the position. The form will need to complete workflow prior to initiating the Position Change form again.

Result:
The Mail Code, Work Schedule, Basic Pay, Cost Distribution, Corporate Function, and Office Location fields appear.
The following fields are populated with the information for the employee's new position:
New Job
New Org. Unit
New Pers. Area
New Pers. Subarea
New Emp. Group
New Emp. Subgroup
Validate the data pulling up on this form is accurate. If the information is inaccurate either the data on the position is incorrect or the effective date is a later date.</td></tr>
<tr><td>7</td><td>Enter the mail code for the new position in the New Mail Code field.

Information: If you don't know the mail code, click the icon to the right of the entry field. This will open a pop-up to search for the mail code.</td></tr>
<tr><td>8</td><td>In the Work Schedule section, select the appropriate Work Schedule Rule from the dropdown menu.</td></tr>
<tr><td>9</td><td>In the Work Schedule section, select:

<table><tr><th>IF the employee is…</th><th>THEN…</th></tr><tr><td>Full-time</td><td>Proceed to the next step</td></tr><tr><td>Part-time</td><td>Enter the percent time of employment in the Percent Time Employed field.</td></tr></table></td></tr>
<tr><td>10</td><td>In the Work Schedule section, select the Assignment Duration from the dropdown menu.</td></tr>
</table>

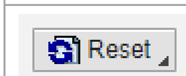
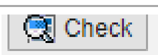
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11</td><td>In the Work Schedule section:
<table>
<tr><th>IF the position is…</th><th>THEN…</th></tr>
<tr><td>Exempt (monthly paid)</td><td>Proceed to the next step</td></tr>
<tr><td>Non-Exempt (hourly paid)</td><td>Confirm the hours per week are correct. If they are not, cease processing the form and process a Maintain Position form. Note the hours per week in the Weekly Work schedule field and note in the Comments the Work Schedule Rule needs to be changed by Compensation.</td></tr>
</table></td></tr>
<tr><td>12</td><td>In the Basic Pay section, select the Pay Scale Level from the dropdown menu. This is typically 00 or 01, unless the position is represented by L615-SvcMaint.

Information: When a Pay Scale Level is changed for Personnel Subarea L615-SvcMaint, the associated hourly rate is auto-populated.</td></tr>
<tr><td>13</td><td>In the Basic Pay section:
<table>
<tr><th>IF…</th><th>THEN enter…</th></tr>
<tr><td>The position is non-exempt (hourly paid)</td><td>The hourly rate in the Hourly Rate field.</td></tr>
<tr><td>The position is exempt (monthly paid)</td><td>The monthly amount in the Monthly Pay Period Amount field.</td></tr>
</table></td></tr>
<tr><td>14</td><td>Click the Recalculate Salary button.

Result: the Estimated Annual Salary field updates with the annual salary based on the new pay scale level and pay period amount and assignment duration of the position. If this amount is not as expected, double check the information entered into the form and the assignment duration.</td></tr>
<tr><td>15</td><td>Review the Cost Distribution section for accuracy:
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>Changes are needed</td><td>Proceed to the next step</td></tr>
<tr><td>No changes are needed</td><td>Select No Change in the Reason for Change dropdown and skip to step 19</td></tr>
</table></td></tr>
<tr><td>16</td><td>Select the reason for changing the cost distribution from the Reason for Change dropdown menu.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>17</td><td>Complete the cost distribution fields in the New Entries section:

Cost Center
Information: If you don't know the cost center, click the button in the Cost Center field to search for the cost center.
Order Number, as applicable
WBS Element, as applicable
Percentage
Warning: The Total Percentage field must equal 100%.
End Date
Information: If the end date is invalid, it will be highlighted in red and must be changed. This is typically due to the end date entered on the form not matching the end date of the account to be charged.

Note: The buttons below allow you to edit input in the New Entries section:
<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>
</td><td>Delete a line of the distribution</td></tr>
<tr><td>
</td><td>Restore the distribution settings to how they initially appeared on the form prior to the changes you made</td></tr>
<tr><td>
</td><td>Perform a check for formatting of the percent time entries up to two decimal places and populate the Description field.</td></tr>
</table></td></tr>
<tr><td>18</td><td>Click the Check button to review percentages and populate the Description field. Confirm the cost distribution is correct based on the Description.</td></tr>
<tr><td>19</td><td>Complete the Corporate Function section, if appropriate. This is typically used if an employee signed a Patent Policy Agreement.</td></tr>
<tr><td>20</td><td>Select the employee's office location from the Building dropdown menu.</td></tr>
<tr><td>21</td><td>Enter the employee's phone number in the Office Phone field.</td></tr>
<tr><td>22</td><td>Upload any relevant documentation for the position change in the Attachments section of the form; for example, an offer letter, HR Compensation approval, etc.

Please refer to the <u>matrix</u> if you need assistance determining what is required for attachments.
<table>
<tr><th>IF…</th><th>THEN…</th></tr>
<tr><td>There are documents to attach</td><td>Proceed to the next step</td></tr>
<tr><td>There are no documents to attach</td><td>Proceed to Step 29</td></tr>
</table>
Warning: do not include attachments containing sensitive information such as social security number, date of birth, etc.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>23</td><td>Click the Browse button in the Attachments section.

Result: The Open window appears.</td></tr>
<tr><td>24</td><td>Navigate to the appropriate file on your computer.</td></tr>
<tr><td>25</td><td>Click the title of the file.</td></tr>
<tr><td>26</td><td>Click the Open button.

Result: The filename appears in the Select File: field.</td></tr>
<tr><td>27</td><td>Click the Attach File button.

Result: The file now appears in the Attachments table.</td></tr>
<tr><td>28</td><td>Repeat steps 23-27 for each attachment.</td></tr>
<tr><td>29</td><td>Enter additional information in the New Comments section for both future reference and to provide additional details to the approvers. This may include comments related to discussions with the manager, your Compensation Analyst, your Talent Recruitment Services contact, etc.</td></tr>
<tr><td>30</td><td>Click the Review button at the bottom of the page. This will check for errors or missing information on the form.

Result: Error messages appear at the top of the form.</td></tr>
<tr><td>31</td><td>Review the form for accuracy.</td></tr>
<tr><td>32</td><td>
<table>
<tr><th>IF the form…</th><th>THEN…</th></tr>
<tr><td>Is accurate</td><td>Click the Submit button</td></tr>
<tr><td>Requires updates</td><td>• Click the Back button
• Make any necessary updates
• Return to step 30</td></tr>
</table>

Result: The form is submitted for approval via workflow. You can track the form progress through Request Tracker. You will receive an email notification when the form is approved.

Warning: Being able to submit the form does not mean the action is error free. If an error occurs, the form will crash and HR Information Systems will receive an automatic notification (ticket). A crash will show in the Request Tracker with the current agent “SAP” and a status of “Correction”. No action is required on the part of the initiator; HRIS will follow up if additional information is needed. HR Information Systems will resolve the issue as soon as possible. Payroll critical items are handled first.</td></tr>
</table>