

Background Information

Banner Conversion	At the time of Banner conversion, positions will be established within Banner for all academic and Civil Service positions.
December 29, 2003	Beginning on this date, units will be required to begin position maintenance. For all employees hired after December 29, a position must exist in Banner to which they can be appointed.
Adding Positions	Positions may be added to a unit's budget at any point during the fiscal year.
Changing Status	Positions may be placed in inactive status at any point during the budget year. At the time that budgets are rolled at the beginning of each fiscal year, all positions (both active and inactive) will be rolled forward to the next budget year.
Eliminating Positions	The preferred time to eliminate positions from a unit's budget is at the close of the fiscal year.

Fiscal Year Budgeting

Definition	The University will require fiscal year budgeting for positions; meaning units will maintain budget information on a fiscal year basis - for both filled and vacant positions. Units will also update position budget information during the course of the year as budget commitments change and/or as position responsibilities vary.
Timeframe for Implementation	Fiscal Year Budgeting will be implemented at the University as of July 1, 2004. Until that time, the budgeted salary field within Banner will be set to zero. At the time of the budget roll for fiscal year 2005, current salaries (from NBAJOBS) will be used to populate the salary budget field. At that point, units will begin active position budgeting.

Establishing a Position in Banner

Academic Positions	Positions are established at the unit level via direct entry into Banner.
Civil Service Positions	Positions are established by completing the form titled "Requisition Form: Create New or Update Existing Civil Service Position" (and submitting to HR for data entry).

Required Fields for Establishing a Position in Banner:

The following fields need to be entered in Banner or on the Position Maintenance Form.

Position Number	Complete the Position Number for Academic Professional positions, but leave blank if submitting to HR on Position Maintenance Form
Status	Indicate whether position will be Active or Inactive. (Frozen and Cancelled are options for position maintenance, but are not used when establishing a position.)
Type	Indicate whether position will be Single or Pooled.
Position Begin Date	Indicate date that position will first be reflected in unit budget.
Position End Date	Do not complete when establishing a position, complete only when position is ended permanently.
Chart of Accounts (COA)	Enter code for chart of accounts from which employee will be paid (Urbana, Chicago, Springfield, or UA).
Position Class (P-Class)	Select from list of valid position classes according to guidelines for employee group.
Appointment Percent	Anticipated percent time of appointment.

Fields Defaulting from P-Class When Establishing a Position in Banner:

The following fields will default from position class and do not need to be entered in Banner or on the Position Maintenance Form unless an override is required.

Position Title	Employee Class (E-Class)	Probationary Period
Salary Group	Salary Group Description	Bargaining Unit
Salary Table	Salary Grade	Work Schedule
Range Low	Range Midpoint	Salary Step
Range High		
Overrides – Civil Service	HR will enter overrides for Civil Service positions.	
Overrides – Academic Professional	Overrides for Academic positions are not anticipated, with the exception of employee class (e-class). All position classes are set up with the benefit eligible e-classes. If the position is not benefits eligible, then an override is required.	
Title Overrides	Title overrides should be specified at the job level, not at the position level.	

PAPE Use When Establishing a Position in Banner (Academic Professional):

PAPE Code	Enter the PAPE code assigned to position in the National Occupation Code field on the Regulatory Information form.
PAPE Requirements	PAPE approval is required for an Academic Professional position if the position - <ul style="list-style-type: none">• Is a new position that does not fit standard title(s) approved for the department.• Has duties that have been substantially updated or revised.• Requires a change due to a change in organizational structure.• Has a change in title.

Position Descriptors	Position Descriptor codes are required when attributes must be associated with the position. Some examples include: scope of authority, Civil Service location occupation code, or work area code.
Descriptor Code/s	The code(s) for the description that applies to the position. (See the Position/Job Descriptors Job Aid for complete information.)
Activity Date	The date that the code is associated with the position.

Establishing a Position Budget

Establishing positions in Banner requires that a position budget be established.

Position Budget Entry Fields	Minimum requirements for establishing a position budget include entry of the following fields.
Fiscal Year	Enter the fiscal year for which the position is budgeted.
Salary Roll Rule	Enter salary roll rule for the position. Options include actual expenditure, current budget, current encumbrance, current salary, range midpoint, remaining budget, and zero. Until July 1, 2004, units should enter the "current salary" option.
Organization	Enter the organization to which the position is assigned.
Date Created	Enter the date on which the position budget record is created.
Status	Enter the status: Approved or Working. (Transferred and Closed statuses are always system generated and would not be used for creating a position.)
Budget ID	Enter the Budget ID (may be selected from a table). Sample Budget IDs include H2004, H2005, etc.
Phase	Enter the Budget Phase (may be selected from a table). Sample Budget Phases include HLAB04, HLAB05, etc.
Budgeted Salary	Amount of money budgeted for this position for the fiscal year. Until July 1, 2004, units should enter zero in the Budgeted Salary field.

Position Budget Default Fields	The following fields will default from other levels of the Banner hierarchy (or are system maintained) and do not need to be entered, unless an override is required.
Base Units	Number of pay periods for the position (12 or 26). Defaults from the Pay Per Year field on the Payroll Identification Form
Position Budget Basis	Values default from the Employee Class Rule form. Period of time the position annual basis is to be worked. Set at 12 for all academic e-classes and 26 for Civil Service.
Position Annual Basis	Values default from the Employee Class Rule form. Period of time the position is based upon or budgeted for. Set at 12 for all academic e-classes and 26 for Civil Service.
Budget Appointment	Effort for the position. Defaults from position appointment %, but can be overridden.
Encumbered Salary	Amount encumbered for the position to this organization for the fiscal year. Based on actual appointment of person to position. Amount is liquidated each pay period by amount of expenditure since 7/1/XX.
Expended Salary	Amount spent by the organization for this position since 7/1/XX.
Remaining Salary	Remaining Salary equals the position budgeted salary minus (encumbered salary + expended salary). It reflects non-committed amount (unencumbered amount) for the position for the fiscal year
Overrides – Civil Service	HR will enter overrides for Civil Service positions.
Overrides – Academic	Overrides for Academic positions must be entered by the unit.
Position Labor Distribution	
Position Labor Distribution is required. The Position Labor Distribution will default to all jobs assigned to the position. Positions may be assigned to one or multiple accounts.	
Default Labor Distributions	Default Labor Distributions will be established for all positions (both single and pooled), and will consist of single or multiple accounts. They will default to the Banner job level unless overridden at the job level.
Position Labor Distribution Required Fields	The following fields must be completed to establish a labor distribution for a position.
Index	Do not enter. This value defaults in.
Fund	Enter Finance Fund Code.
Org	Enter Finance Organization Code.
Account	Enter Finance Account Code.
Program	Enter Finance Program Code.
Salary Budget	Enter amount of salary budget to be charged to this account distribution.
Position Labor Distribution Recalculated Fields	The following fields appear on the position labor distribution form and recalculate based on values in the Salary Budget field. Until July 1, 2004, the Salary Budget field will be zero.
Percent	Automatically recalculated to reflect changes in the Salary Budget field. Identifies the percentage of the position budget to be allocated to this labor distribution.
Totals – Salary	Total amount of all charges.
Totals – Percent	Total percentage of all charges.
Work Schedule Changes	Units will access NZAJOB5 directly to enter work schedule changes for Civil Service positions when the schedule is temporary or only affects a few employees. If the change affects a large group of employees or is a permanent change, please contact your Campus HR office.

Position Maintenance

Position Maintenance is necessary under a range of circumstances, including:

1. Changes to budgeted salary or FTE (After July 1, 2004)
2. Changes to position labor distribution
3. Change in position status (active, inactive, frozen) or position type (single vs. pooled)
4. Position eliminated
5. Change in position class
6. Change in work schedule
7. Change in position attribute, such as PAPE or job descriptors
8. Changes to budget roll rules (After July 1, 2004)

Normal Position Maintenance	If there are no changes in position status, type, FTE, labor distribution, work schedule, or attributes from year to year, then the position is rolled forward from fiscal year to fiscal year according to the salary roll rule contained in the salary roll field in Banner. In these cases, units only need to update the budgeted salary each fiscal year.
Position Maintenance for Changes	If there is a change in position status, type, FTE, budget labor distribution, work schedule, or attributes that occurs after the position is established, maintenance of associated fields in Banner is necessary.
Academic Position	Units enter data changes directly into Banner.
Civil Service Positions	Changed data is entered onto the Position Maintenance form and submitted to HR for entry.
Position Maintenance for Appointing an Individual to a Job	<p>When appointing an individual to a job in Banner, special care should be taken to identify any necessary position level changes that may also need to occur. Position level fields most likely to be impacted by the appointment of an individual in Banner include the following:</p> <ol style="list-style-type: none">1. Position Budgeted Salary – for single positions, should be consistent with the salary for the person/s in the position. (After July 1, 2004)2. Position Labor Distribution – should be consistent with the account/s recognized as budgeted accounts for the individual hired into the position.3. Change in position responsibility – may impact PAPE and other position attributes.