Moving Positions

Process overview
When a new organizational unit is created below the U1 level all positions must move from the U1 level to the new lower level departments. Units will work with HR/Payroll representatives in the Organization Planning Lab to identify the process to move positions. In order to expedite this process for large changes Human Resources has provided a spreadsheet template. This template should be completed by HR Unit Administrator for the new organizational unit.

It is important to note several differences between the organizational restructure change and a day to day activity change:
1. Organizational restructure changes are the result of the creation or modification of an organizational unit as approved by the Office of Planning and Budgets.
2. Changes to employment records as a result of an organizational restructure will not go through normal HR workflow.
3. Prior to changing employment records the new organizational unit or change to the organizational unit must have been recorded in the Organization of Interest (OOI) system.
4. Prior to changing employment records HR workflow and security must be in place for the new organizational unit.
5. Prior to changing employment records any new accounts required for the change must be establish in the Kuali Financial System (KFS).
6. It is advised that organizational restructure changes be prospective in nature rather than retroactive.

Finally, it should be noted that when an employee changes from one organizational unit to another it is important to note that any roles tied to that individual in KFS will be stopped and the employee will be inactive in that system for one day. Once the employee has been reactivated in KFS new roles will have to be granted for the new organizational unit via an Access Request Memorandum (ARM).

Document Completion and Routing
The unit will be provided with a template to record all required HR changes for employees as a result of this organizational restructure. Data that may change as a result of a restructure include:

- Organizational unit number:
  - In most cases this will be the primary organizational unit for the employee.
  - In some cases this will be an additional organizational unit for the employee.
  - Both of the above cases must be included in the spreadsheet.
• Work Location:
  o If, as a result of the change, the physical location of the employee is changing this must be reflected on the form.
• Funding:
  o If, as a result of the change, the employee will be funded by a new account this must be included on the spreadsheet.

NOTE: Since all positions must leave the upper level organizational units when lower sub-organizational units are created (“vacate”), all vacant positions must move as well. Please indicate the new organizational unit and any funding change for the vacant position.