

## Position Management for Academic Appointments

Position management (or position tracking) is a university system to track positions in university HR and financial systems. Positions, whether filled or vacant, provide a more complete accounting of the university's personnel commitments and salary expenses. A position report or listing will be different from an employee report or listing because positions may be vacant if not filled by an employee.

Information about Position Management is available on the OFA website at <https://www.hsph.harvard.edu/faculty-affairs/wasabi/>

### General Information

At SPH, Faculty Affairs (OFA) handles position management differently from Human Resources. Below is information about how this system is used by OFA.

- Position numbers are required only for **paid** appointments in the Senior Faculty, Junior Faculty, and Other Academic employee classes. Unpaid appointments, postdocs, and temporary academics are not included in position management.
- New positions should be created just before the hire action is transmitted so that the position job code, department, business title, and costing will be correct for the appointee who will be hired. When creating a new **Other Academic** position, departments will need to complete OFA's position form (<https://cdn1.sph.harvard.edu/wp-content/uploads/sites/40/2020/01/new-position-form-1.30.2020-Updated.pdf>) and attach it to the Wasabi new position transaction. (Please note: This form is **not** needed for Senior Faculty and Junior Faculty appointments.)
- The Wasabi transaction to create a new position asks for a position title (in addition to a business title.) The position title should be the "HSPH title" on OFA's job code list. (<https://cdn1.sph.harvard.edu/wp-content/uploads/sites/40/2019/05/PeopleSoft-Job-Codes-3-14-2019.pdf>)
- A new position will need to be created when a **postdoc is being moved to a paid appointment in the Other Academic employee class** such as research associate, research scientist, or visiting scientist. This is necessary because postdocs do not have position numbers, but all paid Other Academics do.
- A new position will need to be created when an **unpaid Other Academic, Junior Faculty, or Senior Faculty appointee is moving to a paid appointment.**

- Academic appointees keep their same position number throughout their Harvard career. **A new position does not need to be created when an appointee is promoted or has a change in appointment title.**
- When a department terminates an appointee with a Wasabi termination form, the preparer has an option to inactivate the position. This should be used when the department does not anticipate hiring another person into the same position. The position can be reactivated later, if needed. However, in most cases, a position can be inactivated when an appointee is terminated as it's unlikely that the same position (job code, salary, costing, etc.) will be used in the future.

### **Wasabi Transactions**

- Wasabi data changes using the action/reason "Position Change/Administrative" can be used to change a position's title, salary, budget end date, etc. This is usually used when there is a mis-match between employee data and position data. The effective date of the action should not be before any other actions or changes were made to the employee record. It might be necessary to run a Wasabi employee report to find the most recent effective date for that employee, and use the same date (or a later one) as the effective date for the position change.
- Positions that are no longer needed can be inactivated with a Wasabi termination form. The action/reason for these is "Position Change/Inactivate Position."
- If an inactive position is needed at a later date, it can be reactivated with a Wasabi termination form. The action/reason form is "Position Change/Re-activate Position."

### **Wasabi Position Reports**

In the Personnel Reports section of Wasabi, there is an option to run a Position Report. This report can be run to view all academic positions that have been created, and can be exported as a csv file for use in Excel. There are options to view only vacant positions, filled positions, or both. If the "Include Actions in Export" box is checked, you'll see the history (changes, etc.) of the position. However, each position action is a separate row, so a position may have multiple rows in the export.

The export has many columns, and some seem to be duplicates.

Notes on some fields:

budget\_end\_dt – This should be the same as the appointment end date, but does not get updated when appointments are extended by Isin through the PeopleSoft extract and upload process in June. A Wasabi data change (Position Change/Administrative)

may be needed to update the budget end date to match the appointment end date.  
(There is another field - budget\_end\_dt\_1 – which doesn't seem to have the end date for all rows/actions on a position.)

IncumbentHUID – This field might be blank, but there is another field --  
SPH\_CurrentIncumbentName\_1 -- that shows the person who is in the position. (Also,  
this field - IncumbentHUID\_1 – shows the HUID of the incumbent.)