



Pooled Positions & Fixing FTE etc.

(Updated 02/07/2021)

1. **What is a Pooled Position?** Pooled positions are one position number shared by several employees. The employees in a pooled position must share all the same position components. Watch the *Understanding Position Management* video to review the purpose of Position Management here:

<https://ou.edu/compassproject/deptusers>.

	Must Be Same in Pooled Position (Position Component)	Can Be Different in Pooled Position (Not a Position Component)
FTE/ Standard Hours	✓ Yes	No
“Reports To” supervisor	✓ Yes	No
Funding	✓ Yes	No
Department	✓ Yes	No
Location	✓ Yes	No
Job Code	✓ Yes	No
Job Description	✓ Yes	No
Paid in Norman or HSC	✓ Yes	No
Pay Amount	No	✓ Yes
Time/Travel Supervisor	No	✓ Yes
Start Date	No	✓ Yes

2. **What kind of jobs can be a pooled position?** Pooled positions are limited to certain types of job codes – student employees, graduate assistants, adjuncts, temporary employees, and unpaid people. Norman has thousands of employees in pooled positions. HSC has many unpaid people in pooled positions. Both campuses can continue using pooled positions for the above kinds of jobs.
3. **Why would a department use a pooled position?** Many processes in HR PeopleSoft, recruitment, and budgeting are managed by position number. When an area has multiple employees doing an identical job, they might find it efficient to group employees with identical positions components into one position number.
4. **What should I do if a pooled position does not share all of the required position components above?** The new HR PeopleSoft requires that all position components be the same in a pooled position. **The most common position components that are not shared among existing pooled positions are FTE and “Reports To” supervisor.** This will not work in the new HR PeopleSoft system. This situation can be corrected in one of the following ways:

CAUTION: If you do not choose one of the following options, HR PeopleSoft may overwrite the employee’s job data with whatever information is currently in position data. This data may not be the same data you see on the ePAF. To review position data, search the employee’s **position number** at Navigator > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info.



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- a) You may transfer the employee to their own position number so that they can have unique position components. You may create a new position for this through the ePAF (instructions below).
- b) Or, you may use the options on the ePAF to update all employees in the pooled position at one time through that ePAF so that their position components are identical. This can be done through an ePAF on any employee in the position – just select. “Yes, I want to update the pooled position.”

How to Use a New Pooled Position to Resolve Varying Position Components

The following example describes how to resolve varying FTE among pooled positions, but it applies to fixing any position component. Besides FTE, we recommend fixing “Reports To” at the same time. **Please do not backdate the effective date of an ePAF that is changing position components for the purposes described here.**

1. Each individual in a pooled position must have the same FTE. Determine how many positions you need to group your employees correctly. For instance, you may choose to have 4 new positions each with a different FTE.
2. Search for an individual who will need to be moved to a new position.
 - a. Use the related actions to Transfer them to a Non-Staff Position.
 - b. Choose “Create New Position” on the ePAF.
 - c. Be sure to include the correct FTE for that pooled position.
3. After the ePAF executes, send HR Compensation the eForm ID and the EMPL ID of the employee.
4. HR Compensation will mark the position number as a pooled position.
5. Search the employee you transferred and note their new position number.
6. Search for another individual who will need to be in this same position.
 - a. Use the related actions to Transfer them to a Non-Staff Position.
 - b. Enter the position number found in #5.
 - c. Say “No” when you’re asked about changing the pooled position because you already set it up the way you wanted when you transferred the first employee.
 - d. Submit the ePAF.

How to Change the FTE or another position component on an Existing Pooled Position

(This will change the FTE for everyone in the position.)

- 1) Search an employee that is in the pooled position.
- 2) Use the related actions to select Job Change > Multiple Changes.
- 3) Select “Yes” when asked about changing the pooled position.
- 4) Change the FTE or other position component that applies to everyone in the position.
- 5) Submit the ePAF.