#### 8.9 HRMS Step by Step Guide Job Reclassification (ALL)

**Overview:** This guide provides instruction on reclassifying a department's position and updating the incumbent's job information.

Note: The screen shots used in this guide may not be representative of your access.

#### **RECLASSIFY THE POSITION**

- 1. Navigate to the Add/Update Position Info Page
- Organizational Development
- □ Position Management
- Maintain
   Positions/Budgets
   Add/Update Position
- Info

#### 2. Add/Update Position Info page displays

- ☐ ∫ Find an Existing Value tab defaults
- Enter Position
   Number

Click Search

PeopleSoft.			HR89P	RACT PPL Home	Worklist	Add to Favorites	Sign out
Menu 🖃							
Search:	Main Menu > Organizational Development > Position Management >						
<b></b>	📁 Maintain Positions/Budgets						
▷ My Favorites ▷ Reports	Identifies positions within organization, budgets for positions, and all	lows for creation of job requisitions					
Recruiting Workforce Administration	Add.Update Position Info	Funding Distribution		Position Tra	ansfer only ofer only		
Compensation	about a position.	Forking Distribution		Posicion mana	ster only		
Time Collection Workforce Development							
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<ul> <li>Position management</li> <li>Maintain</li> </ul>	PET/Retroactive Funding Change	Correction PET		PET Caricella.	1011		
Positions/Budgets							
Review Position/Budget							
Into N Desition Deposite							
Position Reports							
D Reporting Tools							
- My Dictionary							

#### Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value	∖dd a New Valu	e	
			_
Position Number:	begins with	✓ 508106	
Description:	begins with	×	
Position Status:	- *		*
Business Unit:	begins with	¥	Q
Department:	begins with	¥	
Job Code:	begins with	¥	Q
Reports To Position Number:	begins with	¥	
🗹 Include History			
Search Clear Bas	sic Search  目	Save Search Criteria	
Find an Existing Value Add a	New Value		

## 3. Description page displays

- Enter appropriate
   Effective Date (date reclassification will begin)
- Enter Reason of JRC
   Job Reclassification
- □ Enter new Job Code
- □ Tab out of field
- Make any other necessary changes, if applicable, to Title, Reports To, Percent of Time, Standard Hours, etc.

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	0.		Save

📷 Save) 🔍 Return	n to Search) (↓≣ Next in List) (T≣ Previous in List) (W Refresh) (All Update/Display) (All Include History)
Position Informati	ion <u>Find   View All</u> First 🛃 1 of 5 🕨 Las
Position Number:	00508106 Accountant III Go To Position Funding
Headcount Status	s: Filled Count: 1 out of 1
'Effective Date:	12/18/2006 🛐 📋 Position Notes 'Status: Active 🔽
'Reason:	JRC Job Re-Classification Action Date: 12/18/2006
Position Status:	Proposed Status Date: 12/18/2006
Job Information	
'Business Unit:	UCOLO Q University of Colorado
Job Code:	B1A3XX 🔍 Accountant III Manager Level: Non-Manager 🗸
'Reg/Temp:	Regular 💙 'Full/Part Time: >= 50% 🗸
Regular Shift:	N/A
Title:	Accountant III Short Title: Acct III Detailed Position Description
Work Location	
Pog Pogion	
Reg Region.	Company Office States
Department:	STODO CONVERSITY OF COLORADO
Location:	14 BCE
Reports To:	1ARCE       Q         Admin & Rsch Ctr-East Campus         00508109       Accountant III         Authority:         al Services       Class Staff Seasonal or Academic Year Appointment?         Opportunity Posp       Preplacement Physical Required         Class Staff Seasonal or Academic Year Staff Spec Quals       Officer Position
Reports To: Essentia Special Faculty/Exempt I Proposed Costs	14RCE       Admin & Rsch Ctr-East Campus         00508109       Accountant III       Appointing Authority:         al Services       Class Staff Seasonal or Academic Year Appointment?       Supervises Classified Staff         Opportunity Posn       Preplacement Physical Required       Class Staff Spec Quals       Officer Position         Professional -       Minimum       Maximum         start Up Cost:       Start Up Cost:       Start Up Cost:
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### APPROVE POSITION CHANGES

#### 4. Navigate to the Position Approval page

- Organizational Development
   Position Management
   Maintain Positions/Budgets
- □ Position Approval

#### 5. Position Approval search page displays

#### Enter Position Number

Click Search

PeopleSoft.		H	89PRAC R00870T Home	Worklist Add to Favorites	Sian out
Menu 📃				, <u> </u>	
Search: > My Favorites > Reports > Recruiting	Maintenu > Creanzational Development = Position Management > Maintain Positions/Budgets Identifies positions within organization, budgets for positions, and allow === Add Update Position Info	ws for creation of job requisitions	- Funding Distri	ibution	
<ul> <li>▷ Workforce Administration</li> <li>▷ Benefits</li> <li>▷ Compensation</li> <li>▷ Time Collection</li> <li>▷ Payroll for North America</li> </ul>	Enter the description, work location, and other information about a position.	Identify salaries and FTEs for positions with an approved budget status.	Funding Distribu	tion	
Payroll Interface     Workforce Development     Organizational Development     Succession Planning	FOPS Budget	Position Approval PET.Retroactive Funding Change	Funding Approv	al I	
Position Management     Position Management     Vorkforce Monitoring     Set Up HRMS     Enterprise Components	FAM Correction PET FAM Correction PET	PET Approval PET Approval	PET Approval PET Approval (S	(Sponsored Proj) Sponsored Proj)	
Tree Manager     Reporting Tools     PeopleTools     Packaging <u>My Dictionary</u>	PET Cancellation PET Cancellation	Batch PET Upload Batch PET Upload	Update No Activ	<u>tivity on Funding</u> ity on Funding	
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#### **Position Approval**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value			
			_
Position Number:	begins with	✓ 508106	
Description:	begins with	*	
Position Status:	- 🗸		~
Business Unit:	begins with	¥	Q
Department:	begins with	¥	
Job Code:	begins with	¥	Q
Reports To Position Number:	begins with	¥	
🗌 Include History 🛛 🗹 Corre	ct History		
Search Clear Bas	<u>sic Search</u> 🖡	Save Search Criteria	

# 6. Position Approval page displays

#### Change Position Status to "Approved"

• Click iii Save

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Posion Numbet-:	00508106	Go To Pos	sition Fund	din
leadcount Status:	Filled	Current Head Count:	1 OtR of	0
		Find View All	First	1 of 5 [!) Las
holl: Acct	III	EssentialServices	5	
Long Accou Descrittion:	intant III			
Effective Date:	12/18/2006 @ Position Notes F	Reason Code: JRC Re-Ciass		у
		12118/2000		
"Posion Status:	Proposed	Atl riReject:	_	

Description | Specific Information | Position and Incumbent Data | Position Approval

#### UPDATE EMPLOYEE'S JOB DATA RECORD 7. Navigate to the Job Data page

Workforce
 Administration
 Job Information
 Job Data

#### 8. Job Data search page displays

□ Enter EmpIID

Click Search

PeopleSoft				
reopieson		н	R89PRACT PPL Home Worklist Add to Favorites	Sign
lenu –				
earch:	Main Menu > Workforce Administration >			
())				
My Favorites				
Reports	Maintain information about a person tied to a specific job record			
Recruiting	Job Data	Update Contract Pay NA	New Employment Instance	
VVorkforce Administration	Enter job information including work location and compensation	Add or update contract pay details including payment type,	Create a new employment instance for a person.	
Personal Information	details.	term, and period.		
Job Information				
Contract Administration	Other Payee	Add Additional Accimment	Iob Data Transfer Robiro only	
- Job Data	Add other payee instance in the Job Record.	Create an additional assignment record for a person's	Job Data Transfer/Rehire only	
- Update Contract Pay NA		organizational instance.	,	
- New Employment				
Instance				
- Other Payee	Contract Administration	Review Job Information	Company Property	
- Add Additional	employees and contractors	person	Enter the assignments of company property.	
- Job Data Transfer/Rehire	Update Contract Pay NA.	Job Summary		
only		Work Study		
- Company Property		E Job List		
Workforce Reports				
Compensation				
Time Collection				
Organizational Development				
Enterprise Learning				
Reporting Tools				
- My Dictionary				

#### Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

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mpl Red Nbr:	=	~			
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🗹 Include History	/				

### 9. Work Location page displays

- A new row of data with same effective date as job reclassification should automatically be inserted into employee's record as result of the update incumbents functionality. The following Action/Reason should display: Position Change/Job Re-Classification
- Make any other job changes, such as pay rate change, appointment end date, probation, etc., using the same effective date as the job reclassification

**Note:** (most job reclassifications result in a pay rate change. Refer to the following steps or the Pay Rate Change Step-by-Step Guide for instructions on entering a pay rate change)

Work Location	Information <u>P</u> ayr	oll <u>C</u> ompe	ensation Employ	ment <u>I</u> nformati /횐 Update	ion (Display) (21 Includ	te Histopr	
Becker,Wendy	EMP			ID: 127	7803 E	mpl Rcd #:	0
Work Location					Find View All	First 🔳 1 (	of 16 🕨 Last
HR Status: 'Effective Date: Action / Reason:	Active 12/18/2006 🛐 Position Change	Empl Status: Sequence:	Active 0 🗍 Job No JRC 🔍 Job Re	otes -Classification	n		+ -
Position Number: Regulatory Region:	00508106 USA	Accountant United Stat	: III ies	Positi Positi	ion Entry Date:	04/0	Current
Company: Business Unit:	CU UCOLO	University o University o	of Colorado of Colorado				
Department: Location:	51000 1ARCE	Payroll & B Admin & R	enefit Services sch Ctr-East Campu	Depa s	nrtment Entry Da	ite: 05/	02/2001
Establishment ID:	CU	University c	of Colorado		Date Creat	ed: 1:	2/18/2006
Save 🔍 Return to S	earch 🔄 Notify 🖉	E Previous tab	画 Next tab 🛛 🥠 Re	efresh	<u></u>	pdate/Display	🔊 Include
ork Location Llob Inform	nation   Payroll   Comp	ensation   Emplo	wment Information				

#### ENTERING A PAY RATE CHANGE 10.

- In the Work Location section, click + to add a new row
- Enter same Effective
   Date as job
   reclassification
- Enter "1" in Sequence box to indicate the pay rate change as the second action on the same effective date
- Select Action/Reason of Pay Rate Change/REC

#### 11. Click the

Compensation tab

- Overwrite the compensation amount that displays with the new compensation amount
- Calculate Compensation

🗆 Click 📳 Save

Becker,Wendy	EMP		ID:	127803 En	npiRcd#: 0
Vork Location				Find   View All	First 🗹 1 of 17 🕨 Last
HR Status:	Active	Empl Status:	Active	Calculate Status	; and Date: 🛛 🛨 🗖
Effective Date:	12/18/2006 関	Sequence:	🔢 📋 Job Notes		
Action / Reason:	Pay Rate Change	*	REC 🔍 Job Reclassif	lication	Current
Position Number:	00508106	Accountant I	11	Position Entry Date:	04/01/2004
Regulatory Region:	USA	United State	s	Position Data	
Company:	CU	University of	Colorado		
Business Unit:	UCOLO	University of	Colorado		
Department:	51000	Payroll & Be	nefit Services	Department Entry Date	e: 05/02/2001
Location:	1ARCE	Admin & Rs	ch Ctr-East Campus		
Establishment ID:	CU	University of	Colorado		
				Date Create	d• 12/10/2006

Work Location | Job Information | Payroll | Compensation | Employment Information

Work Location Job Information Payroll Compensation Employment Information

#### 🛢 Save) 🔍 Return to Search) (+≣Next in List) (†≣Previous in List) (≉Refresh) Update/Display) (2 Include History) EMP Empl Rcd #: 0 Becker,Wendy ID: 127803 First 🕙 1 of 17 🕨 Last Compensation Find View All 🇂 Job Effective Date: 12/18/2006 Sequence: Appr Status Proposed 12/18/2006 1 Notes Appr/Reject Action / Reason: Pay Rt Chg Job Reclassification Current M 🔍 Monthly Contract Pay Compensation Rate: \*Frequency: 4.763.000000 Standard Hours: 40.00 Salary Administration Plan: 920 Grade: B40 Percent of Time: FTE: 1.000000 Job Code: B1A3XX Accountant III 100.00 Comparative Information Monthly Hrly Rate Change Amount: 0.000000 USD Monthly Change Percent: 0.000 - - -

Annual	57,156.000000 USD	Daily	219	.830769 USE	)	
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Work Location | Job Information | Payroll | Compensation | Employment Information

#### APPROVE JOB DATA CHANGES 12. Navigate to the Job Approval page

Workforce
 Administration
 Job Information
 Job Approval

#### 13. Job Approval search page displays

Enter EmplID

### □ Click Search

enu 😑		Press			
D Contract Administration	lob Information	<u>101</u> ×			
Assignments	Maintain information about a perso	n tied to a specific job record			
Review Job Information     Reports     Add Employment     Instance     Job Data	Add Employment Instance or Add Employment Instance or	<u>Ce</u> Add Hire/Rehire Row	Enter job in details.	1 Information including work location and compensation	Add or update <u>Contract Pay NA</u> Add or update contract pay details including payment type, term, and period.
- <u>Update Contract Pay NA</u> - <u>New Employment</u> Instance     - <u>Other Payee</u> - <u>Add Additional</u>	Create a new employment Instan	<mark>ice</mark> istance for a person.	Cther Pa Add other	IVEE payee instance in the Job Record.	Add Additional Assignment Create an additional assignment record for a person's organizational instance.
Assignment – Job Data Transfer/Rehire only – Job Approval	Job Data Transfer Rehire only Job Data Transfer/Rehire only		Job Appr Maintain d	roval lata about a current job.	Pay Rate Change Create pay rate changes.
Enter any informa	tion you have and	click Search. Le	eave fields	blank for a list of all value	95.
Find an Existin	tion you have and g Value	click Search. Le	eave fields	blank for a list of all value	35.
Enter any informa	tion you have and g Value begins with 💌	click Search. Lo 127803	eave fields	blank for a list of all value	95.
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Enter any informa Find an Existin EmplID: Empl Rcd Nbr: Name (LN,FN): Last Name: Department: National ID: HR Status:	tion you have and g Value begins with begins with begins with begins with begins with comparison	click Search. Le	eave fields	blank for a list of all value	25.

### 14. Job Approval page displays

Approve both
 Reasons of REC and
 JRC

🗆 Click 🗟 Save)

🗐 Save) 🔍 Return to Search) (+ 🛛 Next in List) († 🗐 Previous in List) 🗇 Refresh ) ID: 127803 Approval Find First 🖪 1-17 of 17 🕩 Last 12/18/2006 Sequence: 1 🛄 Job Notes Payroll Status: Effective Date: Active PAY Pay Rt Position Mgmnt Record Action: Reason: REC Job Reclassification Cha Department: 51000 Payroll & Benefit Services Action Date: 12/18/2006 Job Code: B1A3XX Accountant III %TIME: 100.00 Std Hrs/Wk: 40.00 Position Number: 00508106 Accountant III Pay Rate Data Annual Rate: 61500.000 Comp Freq: М Monthly Rate: 5125.000 Hourly Rate: 29.567308 \*Approval Status: Approved Status Date: 12/19/2006 Appr/Reject: 12/18/2006 Sequence: 0 🛄 Job Notes Payroll Status: Effective Date: Active Position Mgmnt Record Action: POS Posn ChgReason: JRC Job Re-Classification Department: 51000 Payroll & Benefit Services Action Date: 12/18/2006 Job Code: %TIME: 100.00 B1A3XX Accountant III Std Hrs/Wk: 40.00 Position Number: 00508106 Accountant III Pay Rate Data Annual Rate: 57156.000 Comp Freq: М Monthly Rate: 4763.000 Hourly Rate: 27.478846 \*Approval Status: Approved 🔽 Status Date: 12/19/2006 Appr/Reject:

Payroll Salary Plan Compensation Benefit Program Particiption Employment Information Job Approval Cu

#### Job Reclassification complete