

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

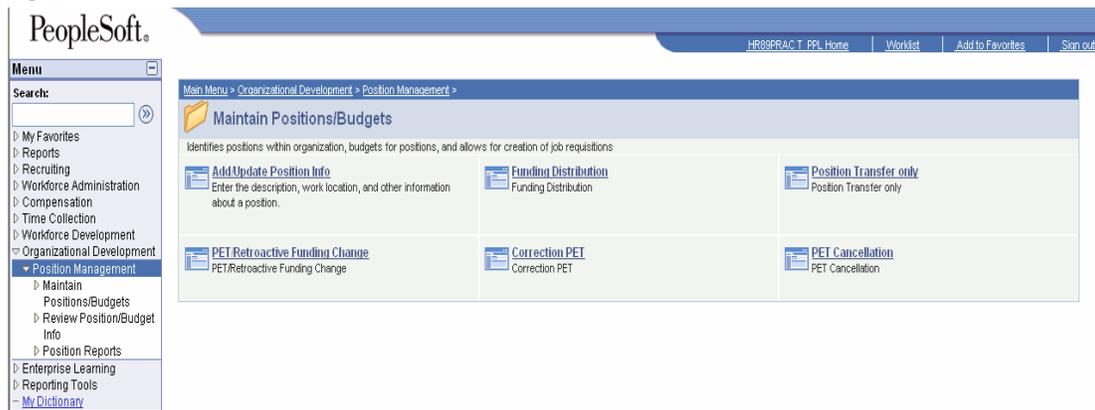
**Overview:** This guide provides instruction on reclassifying a department's position and updating the incumbent's job information.

**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

#### 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
Add a New Value

<b>Position Number:</b>	begins with	<input type="text" value="508106"/>	
<b>Description:</b>	begins with	<input type="text"/>	
<b>Position Status:</b>	=	<input type="text"/>	
<b>Business Unit:</b>	begins with	<input type="text"/>	🔍
<b>Department:</b>	begins with	<input type="text"/>	
<b>Job Code:</b>	begins with	<input type="text"/>	🔍
<b>Reports To Position Number:</b>	begins with	<input type="text"/>	

**Include History**

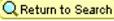
Search
Clear
Basic Search
Save Search Criteria

[Find an Existing Value](#) | [Add a New Value](#)

### 3. Description page displays

- Click  to insert a row
- 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.
- Click 

Description
Specific Information
Position and Incumbent Data






[Find | View All](#)
First
1 of 5
Last

**Position Information**

Position Number: 00508106 Accountant III [Go To Position Funding](#)

Headcount Status: Filled Current Head Count: 1 out of 1

'Effective Date: 12/18/2006  Position Notes

'Reason: JRC  Job Re-Classification 'Status: Active

Position Status: Proposed Action Date: 12/18/2006

Status Date: 12/18/2006

**Job Information**

'Business Unit: UCOLO  University of Colorado

Job Code: B1A3XX  Accountant III Manager Level: Non-Manager

'Reg/Temp: Regular 'FullPart Time: >= 50%

Regular Shift: N/A

Title: Accountant III Short Title: Acct III [Detailed Position Description](#)

**Work Location**

'Reg Region: USA  United States

Department: 51000  Payroll & Benefit Services Company: CU University of Colorado

Location: 1ARCE  Admin & Rsch Ctr-East Campus

Reports To: 00508109  Accountant III Appointing Authority:

Essential Services
  Class Staff Seasonal or Academic Year Appointment?
  Supervises Classified Staff  
 Special Opportunity Posn
  Replacement Physical Required
  Class Staff Spec Quals
  Officer Position

Faculty/Exempt Professional -	Minimum	Maximum
Proposed Costs	Salary Range:	<input type="text"/>
	Start Up Cost:	<input type="text"/>
	Moving Expense:	<input type="text"/>
	<b>Total:</b>	

**Salary Plan Information**

FTE: 1.000000 Percent of Time: 100.00

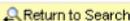
Salary Admin Plan: 920 Grade: B31

Standard Hours: 40.00 Work Period: W  Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

**USA**

FLSA Status: Nonexempt







[Description](#) | [Specific Information](#) | [Position and Incumbent Data](#)

3/5/2007

Job Reclassification – Workforce Administration Module

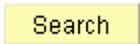
Page 2 of 9

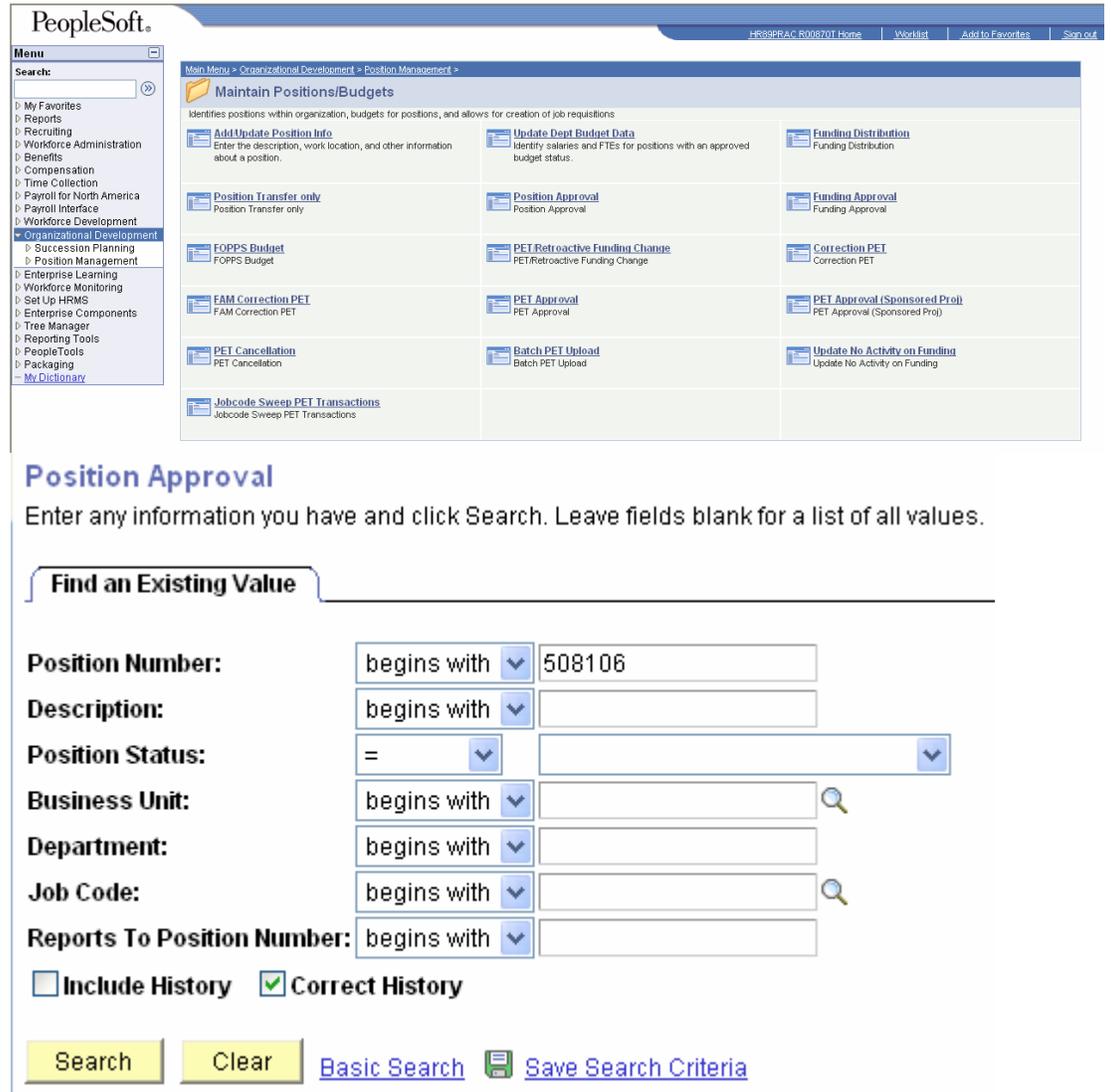
## APPROVE POSITION CHANGES

### 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 



The screenshot shows the PeopleSoft interface for the Position Approval search page. The top navigation bar includes the PeopleSoft logo and user information. A left-hand menu is visible, with 'Organizational Development' selected. The main content area is titled 'Maintain Positions/Budgets' and contains a grid of links for various HR functions. Below this, the 'Position Approval' search page is displayed, featuring a search form with the following fields:

- Position Number:** begins with [dropdown] 508106
- Description:** begins with [dropdown]
- Position Status:** = [dropdown]
- Business Unit:** begins with [dropdown] [magnifying glass icon]
- Department:** begins with [dropdown]
- Job Code:** begins with [dropdown] [magnifying glass icon]
- Reports To Position Number:** begins with [dropdown]

At the bottom of the search form, there are checkboxes for 'Include History' (unchecked) and 'Correct History' (checked). Below the search fields are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

## 6. Position Approval page displays

- Change Position Status to "Approved"

- Click  Save

[Description](#) | [Specific Information](#) | [Position and Incumbent Data](#) | [Position Approval](#)

 Save | [Return to Search](#) | [Next in List](#) | [Previous in List](#) | Refresh | [Update Display](#) | [Include History](#)

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Position Number: 00508106 [Go To Position Fundin](#)  
 Headcount Status: Filled Current Head Count: 1 OR of 0

[Find](#) | [View All](#) | First | 1 of 5 [Last](#)

Short: Acct III Essential Services  
 Long: Accountant III  
 Description:

Approval			
Effective Date:	12/18/2006	@ Position Notes	Reason Code: JRC Re-Class y
			Status Date: 12/18/2006
* Position Status:	Proposed	Approval Reject:	
	<ul style="list-style-type: none"> <li>No Action</li> <li>Proposed</li> <li>Rejected</li> </ul>		

= Save | [Return to Search](#) | Notify | Refresh | Add | Update/Display | Include History | Correct History

[Description](#) | [Specific Information](#) | [Position and Incumbent Data](#) | [Position Approval](#)

## UPDATE EMPLOYEE'S JOB DATA RECORD

### 7. Navigate to the Job Data page

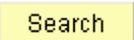
- Workforce Administration
- Job Information
- Job Data

The screenshot shows the PeopleSoft interface for 'Job Information'. The main content area is titled 'Job Information' and contains several task cards with icons and brief descriptions:

- Job Data:** Enter job information including work location and compensation details.
- Update Contract Pay NA:** Add or update contract pay details including payment type, term, and period.
- New Employment Instance:** Create a new employment instance for a person.
- Other Payee:** Add other payee instance in the Job Record.
- Add Additional Assignment:** Create an additional assignment record for a person's organizational instance.
- Job Data Transfer/Rehire only:** Job Data Transfer/Rehire only.
- Contract Administration:** Maintain contracts or other written agreements with their employees and contractors. Includes a sub-link for 'Update Contract Pay NA'.
- Review Job Information:** Inquiry pages and reports that show work information for a person. Includes sub-links for 'Job Summary', 'Work Study', and 'Job List'.
- Company Property:** Enter the assignments of company property.

A left-hand menu is visible, showing a tree structure with 'Job Information' selected and expanded to show sub-items like 'Job Data', 'Update Contract Pay NA', 'New Employment Instance', etc.

### 8. Job Data search page displays

- Enter EmplID
- Click 

### Job Data

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

**Find an Existing Value**

**EmplID:** begins with

**Empl Rcd Nbr:** =

**Name (LN, FN):** begins with

**Last Name:** begins with

**Department:** begins with  

**National ID:** begins with

**HR Status:** =

**Employee Status:** =

**Include History**

[Basic Search](#)  [Save Search Criteria](#)

## 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 | Job Information | Payroll | Compensation | Employment Information

Save | Return to Search | Next in List | Previous in List | Refresh | Update/Display | Include History

Becker,Wendy EMP ID: 127803 Empl Rcd #: 0

Work Location Find | View All First 1 of 16 Last

HR Status: Active Empl Status: Active

Effective Date: 12/18/2006 Sequence: 0 Job Notes

Action / Reason: Position Change JRC Job Re-Classification

Position Number: 00508106 Accountant III Position Entry Date: 04/01/2004

Regulatory Region: USA United States Position Data

Company: CU University of Colorado

Business Unit: UCOLO University of Colorado

Department: 51000 Payroll & Benefit Services Department Entry Date: 05/02/2001

Location: 1ARCE Admin & Resch Ctr-East Campus

Establishment ID: CU University of Colorado

Date Created: 12/18/2006

Save | Return to Search | Notify | Previous tab | Next tab | Refresh | Update/Display | Include History

Work Location | Job Information | Payroll | Compensation | Employment 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

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

Becker, Wendy EMP ID: 127803 Empl Rcd #: 0

**Work Location** Find | View All First 1 of 17 Last

HR Status: Active Empl Status: Active Calculate Status and Dates: + -

Effective Date: 12/18/2006 Sequence: 1 Job Notes

Action / Reason: Pay Rate Change REC Job Reclassification

Position Number: 00508106 Accountant III Position Entry Date: 04/01/2004

Regulatory Region: USA United States Position Data

Company: CU University of Colorado

Business Unit: UCOLO University of Colorado

Department: 51000 Payroll & Benefit Services Department Entry Date: 05/02/2001

Location: 1ARCE Admin & Rsch Ctr-East Campus

Establishment ID: CU University of Colorado

Date Created: 12/18/2006

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

11. Click the

**Compensation** tab

- Overwrite the compensation amount that displays with the new compensation amount
- Click **Calculate Compensation**
- Click **Save**

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

Becker, Wendy EMP ID: 127803 Empl Rcd #: 0

**Compensation** Find | View All First 1 of 17 Last

Effective Date: 12/18/2006 Sequence: 1 Job Notes Appr Status: Proposed 12/18/2006

Action / Reason: Pay Rt Chg Job Reclassification Appr/Reject

Compensation Rate: 4,763.000000 Frequency: M Monthly Contract Pay

Salary Administration Plan: 920 Grade: B40 Standard Hours: 40.00

Job Code: B1A3XX Accountant III Percent of Time: 100.00 FTE: 1.000000

**Comparative Information**

Change Amount: 0.000000 USD Monthly Monthly Hrly Rate

Change Percent: 0.000

**Pay Rates**

	Annual	Monthly	Daily	Hourly
USD	57,156.000000	4,763.000000	219.830769	27.478846

**Pay Components** Customize | Find | First 1 of 1 Last

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NAANNL	0	4,763.000000	USD	M	

Calculate Compensation

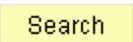
Work Location | Job Information | Payroll | Compensation | Employment Information

## 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 



#### Job Approval

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

**Find an Existing Value**

**EmplID:** begins with

**Empl Rcd Nbr:** =

**Name (LN, FN):** begins with

**Last Name:** begins with

**Department:** begins with

**National ID:** begins with

**HR Status:** =

**Employee Status:** =

[Basic Search](#)  [Save Search Criteria](#)

## 14. Job Approval page displays

Approve both Reasons of REC and JRC

Click 

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

Save Return to Search Next in List Previous in List Refresh

ID: 127803

Approval Find First 1-17 of 17 Last

Effective Date: 12/18/2006 Sequence: 1 Job Notes Payroll Status: Active

Action: PAY Pay Rt Chg Reason: REC Job Reclassification  Position Mgmt Record

Department: 51000 Payroll & Benefit Services Action Date: 12/18/2006

Job Code: B1A3XX Accountant III %TIME: 100.00

Position Number: 00508106 Accountant III Std Hrs/Wk: 40.00

Pay Rate Data		Comp Freq:
Annual Rate:	61500.000	M
Monthly Rate:	5125.000	
Hourly Rate:	29.567308	

Approval Status: Approved Status Date: 12/19/2006 Appr/Reject:

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Effective Date: 12/18/2006 Sequence: 0 Job Notes Payroll Status: Active

Action: POS Posn Chg Reason: JRC Job Re-Classification  Position Mgmt Record

Department: 51000 Payroll & Benefit Services Action Date: 12/18/2006

Job Code: B1A3XX Accountant III %TIME: 100.00

Position Number: 00508106 Accountant III Std Hrs/Wk: 40.00

Pay Rate Data		Comp Freq:
Annual Rate:	57156.000	M
Monthly Rate:	4763.000	
Hourly Rate:	27.478846	

Approval Status: Approved Status Date: 12/19/2006 Appr/Reject:

Job Reclassification complete