Reclassifying a Position

Use this instruction guide when you need to reclassify a position using myUFL.

To reclassify a position, you begin by completing a position action. If the position is filled with an employee, then you also must complete a job action. Both the position and, if applicable, the job action then must be initiated.

Log on to myUFL portal using your GatorLink username and password (http://my.ufl.edu)

Perform the position action

- Navigate to the Add/Update Position Info page, by clicking:
  - Organizational Development
    - Position Management
      - Maintain Positions/Budgets
        - Add/Update Position Info

- Search for the position
  - You can use the drop down menus next to fields to modify search (such as changing begins with to contains)
  - Enter search criteria (such as part of position’s title description, department, or part of position number)
  - Click “Search” button
  - Click to select the correct position
  - Note: There is a position number crosswalk available at MyUFL under the Bridges Transition menu

- On the Description tab
  - Add a row by clicking the plus sign
  - Enter Effective Date. Note: When reclassifying a position, the effective date should be the first day of a pay period
  - Select Reason – use lookup or enter Reason code
    - Note: If the position is filled, use either Reclass with Pay Change or Reclass Without Pay Change
    - If position is vacant, use Job Reclassification. For faculty title change use Title Change
  - Use lookup to enter new Job Code
    - If you do not know the new job code, you can perform a search.
      - Use the drop-down menus if necessary and enter search criteria, such as job code or one of the words from the job’s title description
    - Note: There is a job code crosswalk available at MyUFL under the Bridges Transition menu
  - If necessary, adjust the Full/Part Time field using the drop-down menu
  - Check Salary Admin Plan field. Use lookup to change if necessary
    - Check Pay Grade and change if necessary
      - For information on pay ranges, look at class specifications on the HR web site (http://www.hr.ufl.edu/managers/establishing.htm)
      - For a listing of pay grades and ranges, go to (http://www.hr.ufl.edu/compensation/salary.htm)
  - Check the Work Period
    - For Non-exempt employees: select W
    - For Exempt employees: select W12, W10, W09 depending on appointment period
    - Click the American Flag at bottom of page to confirm FLSA Status.
    - Reminder: Salaried employees are exempt status, and hourly employees are non-exempt status

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Click the Detailed Position Description link (for TEAMS and USPS)
   Paste in a revised position description based upon the Unified Position Description Form (available at http://www.hr.ufl.edu/forms/managers/unifiedposition.rtf)

On the Uf Hr Position Dta tab
   Check any Health Assessment requirements or background checks that apply. If there are no Health Assessment requirements, click the No Requirements for Position box

On the Specific Information tab
   Important: If this is a filled position, you need to make sure that both boxes (Update Incumbents and Include Salary Plan/Grade) in the Incumbents section are checked
   Click the Education and Government heading to expand the section
   Check FTE and confirm it is correct

On the Budget and Incumbents tab
   No changes are necessary on this page. However, this is the only place in Add/Update Position Info that you can check the name and ID of the employee in this position

Save the position action
   Please Note: Upon saving, you may receive warning messages referring to the following issues:
   - Reports to position has not been entered...
   - "No Health Requirements has been checked..."

You can expect these messages and can click OK to continue

Shortcut for Initiating Workflow
   A shortcut button will appear on the Description tab after you click the save button. Click the button to initiate workflow. However, if you need to add a comment, please follow the instructions below.

Initiate the position action
After completing a position action, you will need to initiate the position action into workflow. A position action that is completed and saved does not become effective until level 1 and level 2 approvers approve it. It will not be approved until it has entered workflow.

Navigate to the UF HR Approve POSN page, by clicking:
   Organizational Development
      Position Management
      UF HR APPR POSN

Add comments in the More Information field
  Note: For a reclassification, you are still required to e-mail or fax an organizational chart to employment and classification
Click the Save button to initiate
Perform the job action
Once you have completed and initiated the position action, you may need to complete a job action as well. The only circumstance in which a job action will not be required is if the position is vacant.

- Navigate to the Job Data page, by clicking:
  - Workforce Administration
    - Job Information
      - Job Data

- Search for the employee
  - Enter search criteria (such as last name or employee ID) of the employee you are reclassifying
  - Click “Search” button
  - Click to select the employee’s record

- On the Work Location tab
  When you saved the position action, the system automatically created a new job row based on that position action.
  - Notice the Effective Date: Month and Day should reflect the effective date that you entered for the position action. The Year should come in as 9999 and will be corrected by level 2 approver.
  - Confirm that Action and Reason are correct
    When a job row has been created as the result of a position action, the Action for the new job row will display as Position Change. The Reason should be the same one you chose for the position action – in this case, either Reclass with Pay Change, Reclass without Pay Change, Job Reclassification, or Title Change
  - Check Work County and use lookup to change if necessary

- On the Job Information tab
  - Confirm that Standard Hours and FTE are correct. Note: If they are incorrect they should be changed on the Add/Update Position Info page
  - Check Empl Class field, use drop down to change as necessary. Note: For most employees, Empl Class is Regular. If you have questions about employee class, refer to the Job/Position Action Matrix in the resources section of the UF Bridges site to check (http://www.bridges.ufl.edu/hiring/HiringMatrix.xls)

- On the Payroll tab
  - Check Pay Group and change if necessary. Note: May require changing if employee is moving from non-exempt to exempt, or vice-versa
  - Change Employee Type if necessary
    Note: For non-exempt employees choose H – Hourly. For exempt employees choose E – Exception Hourly
  - Check Holiday Schedule field
    Note: For non-exempt employees choose NONHOL. For exempt employees choose UFL

- On the Compensation tab
  - Enter salary changes in the Comp Rate field
  - If the employee is changing FLSA status (from non-exempt to exempt, or vice-versa) then change Rate Code, Pay Component Frequency, and Comp Rate Frequency
    - Rate Code:
      Exempt – NAANNL
      Non-exempt – NAHRLY
    - Pay Component Frequency:
      Exempt – A
      Non-exempt – H
    - Comp Rate Frequency:
      Exempt – B12 (B09 or B10 for 9- or 10-month appointments)
      Non-exempt – H
If you made salary changes, click the Calculate Compensation button

Next you will need to navigate to the Time and Labor Data page:
- Click the Employment Data link at the bottom of the page
- Click the Time Reporter Data link
  
  **Note:** On the Time and Labor Data page, you may need to change the Time Reporter Type and Template (if the employee is switching from non-exempt to exempt, for example) as well as the Workgroup

- If you are making any changes on the Time and Labor Data page, you should **add a row** first
- Enter the **Effective Date:** This should be the same as the job row’s effective date
- Check **Time Reporter Type:** If the employee is changing from non-exempt to exempt, you will need to switch from Punch to Elapsed. If the employee is moving from exempt to non-exempt, then you would switch from Elapsed to Punch. Click the correct Radio button to switch
- Check **Time Reporting Template:** For non-exempt employees, both the elapsed and the punch template should be chosen. Exempt employees only need to have the elapsed template (although it causes no problems if both are selected for an exempt employee). You can use the lookups to select the template(s)
- Check **Workgroup:** Use the lookup to select the correct Workgroup. If you need guidance, refer to the Time and Labor Enrollment Matrix in the resources section of the UF Bridges website ([http://www.bridges.ufl.edu/hiring/EnrollmentMatrix.xls](http://www.bridges.ufl.edu/hiring/EnrollmentMatrix.xls))
- Click OK

The job action is complete, click the Save button

**Shortcut for Initiating Workflow**
- A shortcut button will appear on the Work Location tab of the Job Data page after you click the save button. Click the button to initiate workflow. However, if you need to add a comment, please follow the instructions below.

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**Initiate the job action**
After completing a job action, you will need to initiate the workflow. A job action that is completed and saved does not become effective until level 1 and level 2 approvers approve it. It will not be approved until it has entered workflow.

- Navigate to the UF HR Approve Job page, by clicking:
  - Workforce Administration
    - UF HR Approve Job
  - UF HR Approve Job

- Enter search criteria for the employee, such as last name or employee ID
- Select the correct job row – use the effective dates to identify the correct job row
- Add comments in the More Information field
  
  **Note:** In the More Information field, you will want to add any information that level 1 and level 2 approvers need. As a best practice, you should include salary information in this field when the reclassification involves salary changes.

- Click the Save button to initiate
Notes
Remember these best practices
- Review web tutorials and instructional guides for more information at www.bridges.ufl.edu/training
- Use the instructional guides as “job aids”
- “Clicking around” is NOT a good substitute
- You can save wrong or incomplete transactions

For assistance
- Contact the UF Help Desk for questions at 392-HELP
- For questions about reclassifications, contact Employment and Classification at 392-4621