Promote a Position and employee, including Fringe Benefit changes

This procedure would be used when you are hiring a new employee and do not have an appropriate vacant line for that position. You can use any one of the vacant lines you have and change the Job title and, if needed, change the Salary Admin plan which adjusts the Fringes.

1. From the My Task List > Budget Preparation > Manage position and employee data > Maintain position data form, select the vacant position for which a promotion will be provided.

2. Click on the Job Name cell.

3. Click the job Drop Down Arrow.

4. Use the Search field to search for a position name or job number.

5. Once found, select the position name or job number you want.
NOTE: The cell may flash to yellow to indicate a recent edit has not yet been saved.

6. If no additional changes are needed to this position or the salary admin plan remains the same, Skip to Step 21.

In this example, we need to change the benefits from a TEAMS rate to a Faculty rate.

Change the Salary Admin Plan

7. Right-click on the newly changed position.

8. Choose Edit Position Details.

9. Click the Salary tab. Notice the Salary Admin Plan still says TA12 which is a TEAMS salary admin plan.
10. Click the **Fringes** tab and notice the fringes are TEAMS fringe rates.

11. Go back to the **Salary** tab and **right-click** on any of the cells in the Position Details section.

12. Click **Delete Salary Information**.
13. **Right-click** on any cell in the Position Details section and choose *Add Salary Information* to add a new salary admin plan.

14. Click the **Salary Grade Select Members** icons to search for and locate the appropriate salary grade for this position.

15. Expand the Salary Grades and Faculty categories, and then click on the appropriate salary grade.

   In this example, we chose **FA09**, which is a 9 month Faculty Salary Admin Plan.
16. Once the Salary grade is chosen, click the right arrow to send it over to the **Element area** on the right hand side and then click **OK**.

17. From the **Add Salary Information** window, adjust your Effective Start Date if needed.

   In this example, we changed it to **10/15/2016**.

18. Click the **Add** button.
After adding the new salary, you must run the Calculate Compensation Expense for the new Fringe Benefit to be reflected.

19. **Right-click** on any cell in the **Position Details** section and choose **Calculate Compensation Expense**. Then run the **Allocate Compensation Budget to GL Accounts**.

20. Go to the **Fringes** tab and notice the fringes are now Faculty fringes.
Promote an Individual

21. Click **Maintain filled positions** from the Budget Prep panel.

22. Click on the job name and select the drop down arrow.

23. Use the top field to search for a position name or job number.

24. Click the position name or job number you want.

**NOTE**: The cell may flash to yellow to indicate a recent edit has not yet been saved.

If no additional changes are needed, you complete this task. If the salary admin plan changes, you need to update the Salary and Fringe benefit. Follow the steps below.

25. **Right-click** on the name of the employee holding newly changed position.
26. Choose **Edit Employee Details**.

27. Repeat steps 9 – 18 above as needed.

28. Run **Calculate compensation budgets** and **Allocate compensation to general ledger accounts** as needed.

If you need help with...

- Technical issues, contact the UF Help Desk:
  - 392-HELP(4357)
  - helpdesk@ufl.edu

- Policies and Directives, contact the UF Budget Office:
  - 392-2402
  - [http://cfo.ufl.edu/administrative-units/budget/](http://cfo.ufl.edu/administrative-units/budget/)