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.

1301 Fine Art	s Office of the Dean 💌 🔶															
	Јор		dof		Job		Position Start Date	Position End Date	Occupancy Status	Annual Salary Spread	Default Weekly Hours	Ava F	ailable FTE	40- Hour FTE	⊳ Total FTE	Status
P_00005734	DEAN & PROF - 000449		714147		en di	to mile-	40		0	1	1	Acti				
P_00005736	Executive Assistant I - 003707	Entr	ies					×	0	1	1	Acti				
P_00005737	DEVELOPMENT/ALUMNI AFF, CRD 1 - 00		4.						0	1	1	Acti				
P_00005739	ACADEMIC SUPP SVCS, CRD 1 - 001235	Sear	cn [0	1	1	Acti				
P_00005814	Human Resources Generalist I - 003113	Nan	ne	-			_		0	1	1	Acti				
P_00006108	Public Relations Spec III - 002522 5	Aca	demic Pro	ogram Spe	C III - 004025				-0.5	0.5	0.5					
P_00008608	ASO DEAN & PROF - 000456	Aca	demic As	sistant II .	004030			1	0	1	1	Acti				
P_00008831	SR ASO IN - 001558	Aca	demic As	sistant III	- 004034				0	1	1	Acti				
P_00009022	Fiscal Assistant II - 002009	ASC	DIR, Ca	reer Servi	ces - 004037				0	1	1	Acti				
P_00009052	OFFICE AST - 000817	Con	e Rsch Fa	cil Specia	list III - 003953	3			-0.5	0.5	0.5					
P_00009080	Web Developer - 001899	Imn	nigration	Specialist	I - 003119				0	1	1	Acti				
P_00009081	ACADEMIC PROGRAMS, CRD 1 - 001140	Imn	nigration	Specialist	II - 003120											
P_00017120	DEVELOPMENT/ALUMNI AFF, CRD 4 - 00	HR	Investiga	tor - 0031	21				0	1	1	Acti				
P_00020122	AST DEAN & LECTURER - 000468	HSC	C RAC Adr	ninistrato	r II - 003921	04700			0	1	1	Acti				
P_00020367	Executive Assistant I - 003707	PRC	GRAM CO		AGENTIT-0	01789		1	0	1	1	Acti				
P_00021200	BUSINESS MGR 3 - 001446	ASS	OCIATEI	IN/SK ASS	OCIATE IN - U	11/92			0	1	1	Acti				
P_00021830	Academic Program Spec III - 004025	•	7/1/16		Filled	12 months	40		0	1	1	Acti				



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.

1301 Fine Art	ts Office of the Dean 💌 🔶									
	dot	Position Start Date	Position End Date	Occupancy Status	Annual Salary Spread	Default Weekly Hours	Available FTE	40- Hour FTE	⊳ Total FTE	Status
P_00004569	PROF - 000518	7/1/16	5	Not Budgeted	12 months	40				
P_00004570	PROF - 000518			~		40				
P_00004779	DIR, Campus IT - 002213	🔒 Edit Positi	on Details			40	0	1	1	Acti
P_00004869	MGR, Human Resources - 002154	 C	Compensa	tion Expanse		40	0	1	1	Acti
P_00005734	DEAN & PROF - 000449		compensa			⁶ 40	0	1	1	Acti
P_00005736	Executive Assistant I - 003707	Allocate C	ompensati	on Budget to GL	. Accounts	40	0	1	1	Acti
P_00005737	DEVELOPMENT/ALUMNI AFF, CRD 1 - 00					40	0	1	1	Acti
P_00005739	ACADEMIC SUPP SVCS, CRD 1 - 001235					40	0	1	1	Acti
P_00005814	Human Resources Generalist I - 003113	Assian Em	plovee			4 0	0	1	1	Acti
P_00006108	Public Relations Spec III - 002522	Edit				40	-0.5	0.5	0.5	
P_00008608	ASO DEAN & PROF - 000456	EUIL				40	0	1	1	Acti
P_00008831	SR ASO IN - 001558	Adjust				40	0	1	1	Acti
P_00009022	Fiscal Assistant II - 002009	🔊 Comment	s			40	0	1	1	Acti
P_00009052	OFFICE AST - 000817	* Supportin	o Detail			40	-0.5	0.5	0.5	
P_00009080	Web Developer - 001899	R Change H				40	0	1	1	Acti
P_00009081	ACADEMIC PROGRAMS, CRD 1 - 001140	Change n	istory			40				
P_00017120	DEVELOPMENT/ALUMNI AFF, CRD 4 - 00	Attachmer	nts			40	0	1	1	Acti
P_00020122	AST DEAN & LECTURER - 000468	🔒 Lock/Unlo	ck Cells			40	0	1	1	Acti
P_00020367	Executive Assistant I - 003707	Select All				40	0	1	1	Acti
P_00021200	BUSINESS MGR 3 - 001446			~		40	0	1	1	Acti
P_00021830	Academic Program Spec III - 004025	7/1/16	;	Filled	12 months	40	0	1	1	Acti

- 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.

(General	Employee	FTE	Status Changes Salary	Additional E	arnings	Fringes	Benefit	Elections	Distribution	s	
), E	mployee:Vacancy	
	¥			Option Value		Opti	on Start D	ate	Option	End Date	Allows Value Change	Override Option Value
	TA12 1	1st Element C	hange		0			7/1/16			Yes	0



10. Click the **Fringes** tab and notice the fringes are TEAMS fringe rates.

Scenario:Budget	麗 Scenario:Budget 読 Entity:1301 Fine Art							Version:Working	Position:P_00021830		
Position Details											
General Employee FTE Status Changes Salary Additional Earnings Fringes Benefit Elections Distributions											
					S. Emplo	yee:Vacancy					
+		Option Value	Override Option Value	Option Start Date	Option End Date	Value Type Input	Allows Value Change	Value Type			
Fringe_TEAMS_USPS_Exempt	1st Element Change	36.9	36.9	7/1/		Percentage of Overall Earning	No	Percentage of Overall Earnin			
Fringe Non-Benefit Earnings	1st Element Change	7.6	7.6	7/1/		Percentage of Other Earning	s No	Percentage of Other Earnings			

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.

	111	Scenario	:Budg	et	률 Entity:1301 Fine Arts Office of the Dean Worsion:Wor											Version:Workin	g
4	Position D	Details															
	General	Employ	/ee	FTE	Status Changes	Sa	lary A	dditi	ional Earni	ings Fr	inges Be	nefi	t Elections	Distri	butions		
															S. Emp	oloyee:Vacancy	
					Option Value	c)ption Sta Date	rt	Option E Date	End 4	Allows Value Change	ue Override Option Value)ption			
	TA12 1	st Eleme	ent Cha	ange		0	7/1/1	.6		Ye	es			0			
												_	Return to P	Previous	Form		
												Ģ	Add Salary	Inform	ation		_
												G	Delete Sala	iry Info	rmation		
												C,	Calculate O	ompen	sation Ex	pense	5
Πr												C)	Allocate Co	mpensa	ation Bud	get to GL Accounts	
	Expense												Edit				+ 1
ſ	Total Pos	ition	Vacar	nev									Adjust				+
-	Total Tos		Vacui	incy.								ABC	Comments				_
												+=	Supporting	Detail			
					YearTotal	July	August	Se	eptember	October	November	-	Change His	tory			у
	Basic S	Salary E	xpense	e	50,400.84	3,862	2 3,862		3,862	3,862	3,862		Attachment	te			62
	Benefit	ts Exper	nse		18,598	1,42	5 1,425		1,425	1,425	1,425	<i>9</i>	Audenmen	la Calla			25
off	nation							×	5,287	5,287	5,287	٠	Colort All	K Cells			
									3,862	3,862	3,862		Select All				62
C_De	eleteSalE	lemen	t was	succe	essful.								Data Valida	ation Me	essages		
												-			, v		_
							OK										



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

	Scenario:Budge	et			赤 Ent	tity:1301 Fine A	rts C	Office of the	e Dean		
Position I	Details										
General	Employee F	FTE St	atus Change	s Sala	ary A	dditional Earnin	gs	Fringes	Benefit Election	ns Dist	ributions
											Em;
Right-clic	k and add Salar	ry Grades	S								
	Option Value		Option	Start Da	ite	Option End Date	Allo	ows Value Change	Override Option Value		
						_		~			
						Return to	Prev	ious Form			
						🕞 Add Salar	y Inf	ormation]
						🕞 Delete Sa	lary i	Informatio	n		5
						🕞 Calculate	Com	pensation	Expense		
Expense						🕞 Allocate C	Comp	ensation B	udget to GL Acco	ounts	
Total Por	vacan	V-V				🔒 View Bud	get I	mpact of S	alaries		
Totarros		n_y				Edit				•	
						Adjust				•	Employe
			YearTotal	July	August	Comment	s				Februar
Basic	Salary Expense		50,400.84	3,862	3,862	🔚 Supportin	g De	tail			3,86
Benefi	its Expense		18,598	1,425	1,425	🛐 Change H	listor	у			1,42
⊿ Total	Compensation	Expense	68,999	5,2	5,287	Attachme	nts				5,28
Gross Ea	arnings		50,401	3,862	3,862	🔒 Lock/Unio	ock C	ells			3,86
						Filter				•	
								~			

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

Runtime Prompts - Add Salary Information	;	ĸ
Prompt Text	Value	
📑 * Select Salary Grade	"Unspecified Element"	
* Enter Effective Start Date	7-1-2016	
	Add Cancel	

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**.

Member Selection					×
Dimensions Element					
- Q 🎾 🕽	🔌 💀 Y 💥 '9 🚱		AV		1
Member Name	Alias		Member Name	Alias	
⊿ Element	Element		✓ Element	Element	1
∡ Salary Grades	Salary Grades		FA09	EA09	
Faculty	Faculty				1
FA09	FA09				
> FA10	FA10				
> FA12	FA12				
FASU	FASU				
COM Clinical Faculty	COM Clinical Faculty	>			
Exempt TEAMS/USPS	Exempt TEAMS/USPS	Add			
Non-Exempt TEAMS/USPS	Non-Exempt TEAMS/USPS	8			
		Remove			
		m			
		Remove All			
Help				OK Cancel]

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.

Runtime Prompts - Add Salary Information		×
Prompt Text	Value	
🐺 * Select Salary Grade	FA09	91 ₊
* Enter Effective Start Date	10/15/16	



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**.

General Employee FTE	Status 0	hanges	Salary	Additiona	l Earnings	Fringes	Benefit Ele	ections	Distri	ibutions
										S. Emp
	Option Value	Opt	ion Start Date	Option End Date	Allows Va Chang	alue (e Op	Override ition Value			
FA09 1st Element Change		0	10/15/16		Yes		0			
	1	Ret	urn to Pre	vious Form						
Right		🕞 Add	l Salary In	formation						
click h	ere	🕞 Del	ete Salary	Information						
		🕞 Calo	culate Con	npensation E	xpense					
		🕞 Allo	cate Com	pensation Bu	dget to GL	Accounts	3			
Expense		Edit	t				•			
Total Position Vacancy		Adj	ust				•			
		ABC Con	nments							
		* Sup	porting D	etail						Employe
	Yea	Cha	nae Histo	rv			er Decer	mber Jan	uary	Februar
Basic Salary Expense	50,4	Atta	achments				2 5	5,793 3	,862	3,86
Benefits Expense	1	A Loc	k/Unlock (Tells			.5 2	2,138 1	,425	1,42
I otal Compensation Experience	nse 68	col	act All				7 7,	,931 5,	,287	5,28
Gross carnings	5	Sek					NZ 5	0,795 B	,002	3,85
		Dat	a Validatio	n Messages						

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

Position Details									
General Employee FT	Status Changes Sa	alary A	dditional Ea	arnings	Fringes	Benefit Elections	Distributio	ons	
							9	Employee	e:Vacancy
+		Option Value	Override Option Value	Option Start Date	Option End Date	Value Type In	put	Allows Value Change	Value Type
Fringe_Faculty	1st Element Change	26.9	26.9	10/15/		Percentage of Overal	l Earnin	No	Percentage of Overall Earnin
Fringe_Non-Benefit_Earni	ngs 1st Element Change	7.6	7.6	7/1/13		Percentage of Other	Earnings	No	Percentage of Other Earnings



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.

	P_00006108	11/10/10061		Public Relations	Spec III - 002522		14.14.7	"Unspecif	Albert Alli	News	
	P_00008608	-static care		ASO DEAN & PR	ROF - 000456	Entries	Academic n	iogram	×		×
	P_00008831	Selection () or	0.000333488	SR ASO IN - 00	1558	Name	Academic p	ogram	^		
	P_00009022	The statement	88613981	Fiscal Assistant	II - 002009	ACADE	MIC PROGRA MIC PROGRA	MS, CRD 1 - 00 MS, CRD 2 - 00	1140 1323		
	P_00009052	-		FISCAL AST - 0	00833	ACADE	MIC PROGRA MIC PROGRA	MS, CRD 3 - 00 MS, CRD 4 - 00	1324 1325		
	P 00009080	Harry Princesso	100001000000	Web Developer	- 001899	Acader Acader	nic Program S nic Program S	pec I - 004023	4		
	P_00017120	-	B: (818148)	DEVELOPMENT	ALUMNI AFF, CRD 4 -	Acader 00	nic Program S	pec III - 00402	25		᠆
					- 000468						
,00005728	Hudges, Jerrifer Trien	6-22989079	ACADEMIC SUPP SVC	, CRD 1 - 961235	3/5/54						
,00005814	Trucano, George E-38	100400	Human Resources Go	eralist 1 - 002013	3707						
_00006108	To be Hired 1		Academic Program Spe	ec III - 004025 👻	7/5/06						
-	support of the second second	and a second	And the second s		1000						

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.

P_00005814	Тицкина, безгре Б-38823800	~	
		Calculate Compensation Expense	
P_00006108	To be rered 1	🕞 Allocate Compensation Budget to GL Accounts	-
P_00008608	Schaefer, Edward E-39641031		
P_00008831	Rubertson,Laura 97235490	Delete Employee Assignment	
P_00009022	Ward, Jennice 09460306	Assign Employee	•
		급 Edit Employee Details	
P_00009052	To be rered 6	Change Status	5
P_00009080	Rero, Thomas Genild 86826330	Review Employee Allocation Results	
		Edit	•
P_00017120	M(31116),38111/181 (3515/1183)	Adjust	•
P_00020122	Kalenic, Anthony 45113031	Comments	
D 000000267	Coll Report Matching Statistics	🚈 Supporting Detail	
P_00020367	Parhulher wernes behathet	🐯 Change History	-
		~	- 1

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:
 - o 392-HELP(4357)
 - o helpdesk@ufl.edu
- Policies and Directives, contact the UF Budget Office:
 - o **392-2402**
 - o <u>http://cfo.ufl.edu/administrative-units/budget/</u>