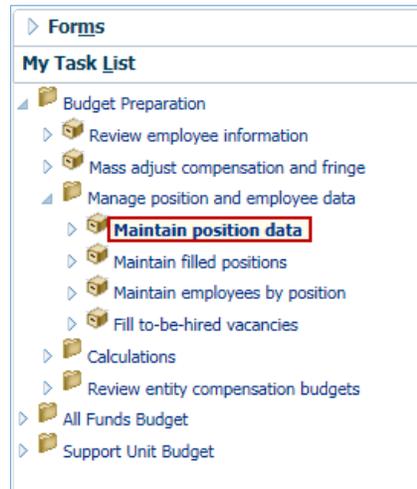


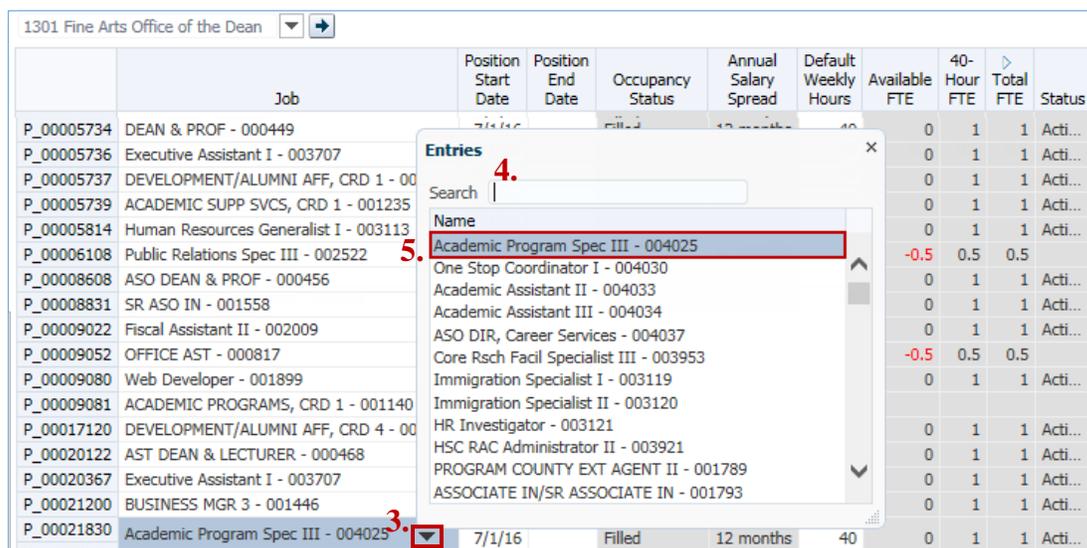
Promote a Position and employee, including Fringe Benefit changes

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.



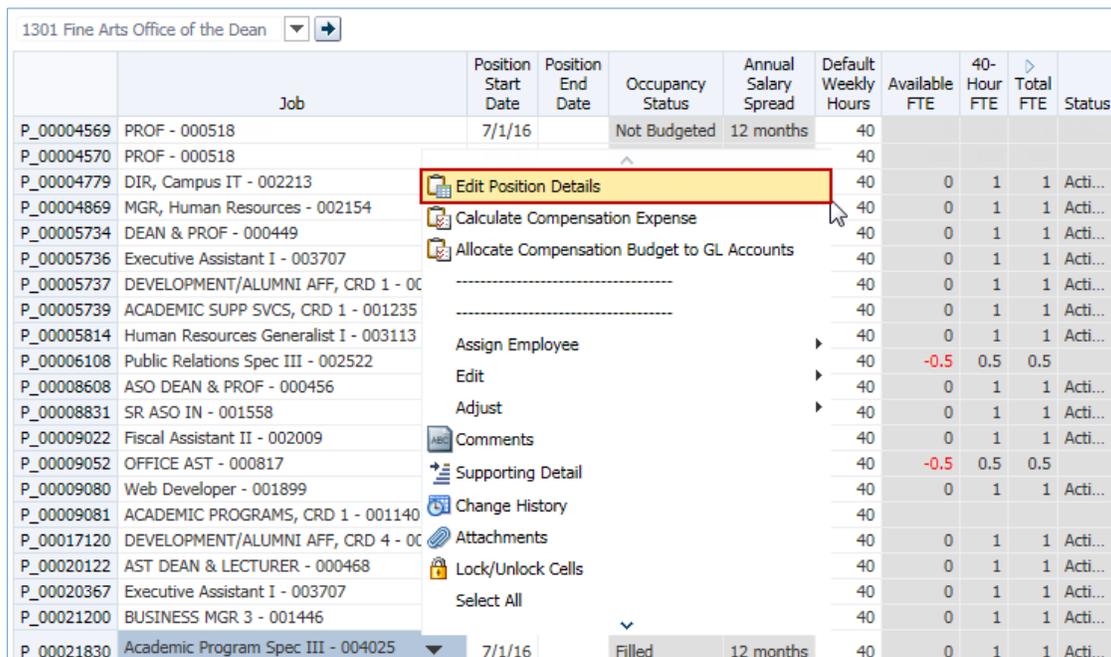
NOTE: The cell may flash to yellow to indicate a recent edit has not yet been saved.

- 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.

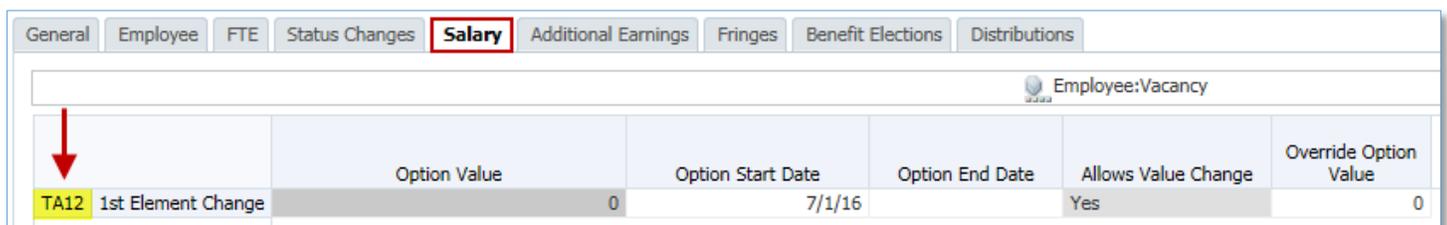
Change the Salary Admin Plan

- Right-click** on the newly changed position.



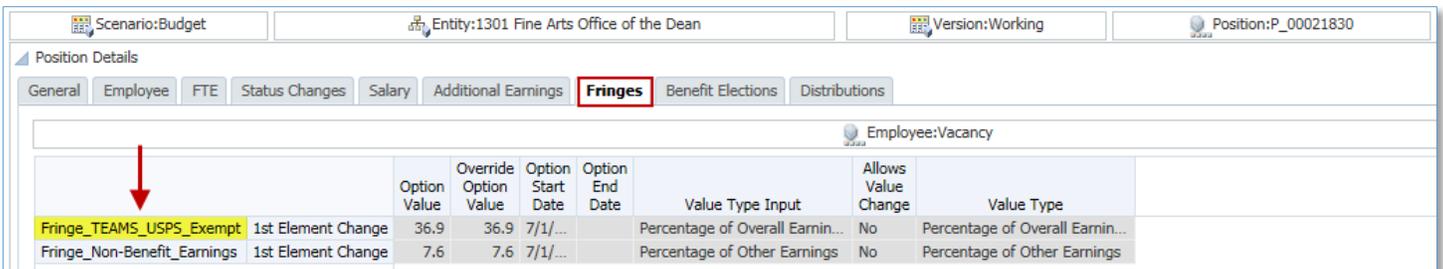
	Job	Position Start Date	Position End Date	Occupancy Status	Annual Salary Spread	Default Weekly Hours	Available FTE	40-Hour FTE	Total FTE	Status
P_00004569	PROF - 000518	7/1/16		Not Budgeted	12 months	40				
P_00004570	PROF - 000518					40				
P_00004779	DIR, Campus IT - 002213					40	0	1	1	Acti...
P_00004869	MGR, Human Resources - 002154					40	0	1	1	Acti...
P_00005734	DEAN & PROF - 000449					40	0	1	1	Acti...
P_00005736	Executive Assistant I - 003707					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					40	0	1	1	Acti...
P_00006108	Public Relations Spec III - 002522					40	-0.5	0.5	0.5	
P_00008608	ASO DEAN & PROF - 000456					40	0	1	1	Acti...
P_00008831	SR ASO IN - 001558					40	0	1	1	Acti...
P_00009022	Fiscal Assistant II - 002009					40	0	1	1	Acti...
P_00009052	OFFICE AST - 000817					40	-0.5	0.5	0.5	
P_00009080	Web Developer - 001899					40	0	1	1	Acti...
P_00009081	ACADEMIC PROGRAMS, CRD 1 - 001140					40				
P_00017120	DEVELOPMENT/ALUMNI AFF, CRD 4 - 00					40	0	1	1	Acti...
P_00020122	AST DEAN & LECTURER - 000468					40	0	1	1	Acti...
P_00020367	Executive Assistant I - 003707					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...

- Choose **Edit Position Details**.
- Click the **Salary** tab. Notice the Salary Admin Plan still says TA12 which is a TEAMS salary admin plan.



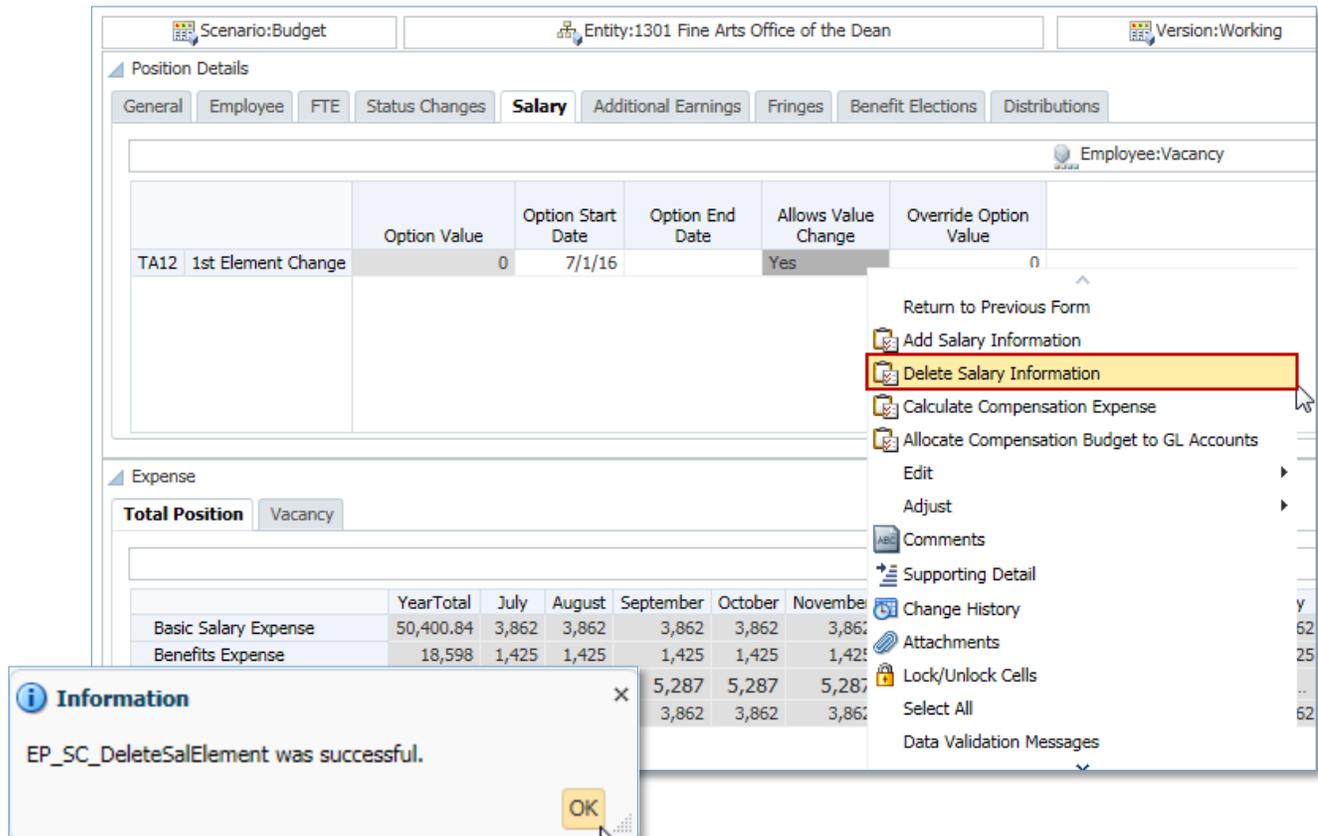
Option Value	Option Start Date	Option End Date	Allows Value Change	Override Option Value
TA12 1st Element Change	7/1/16		Yes	0

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

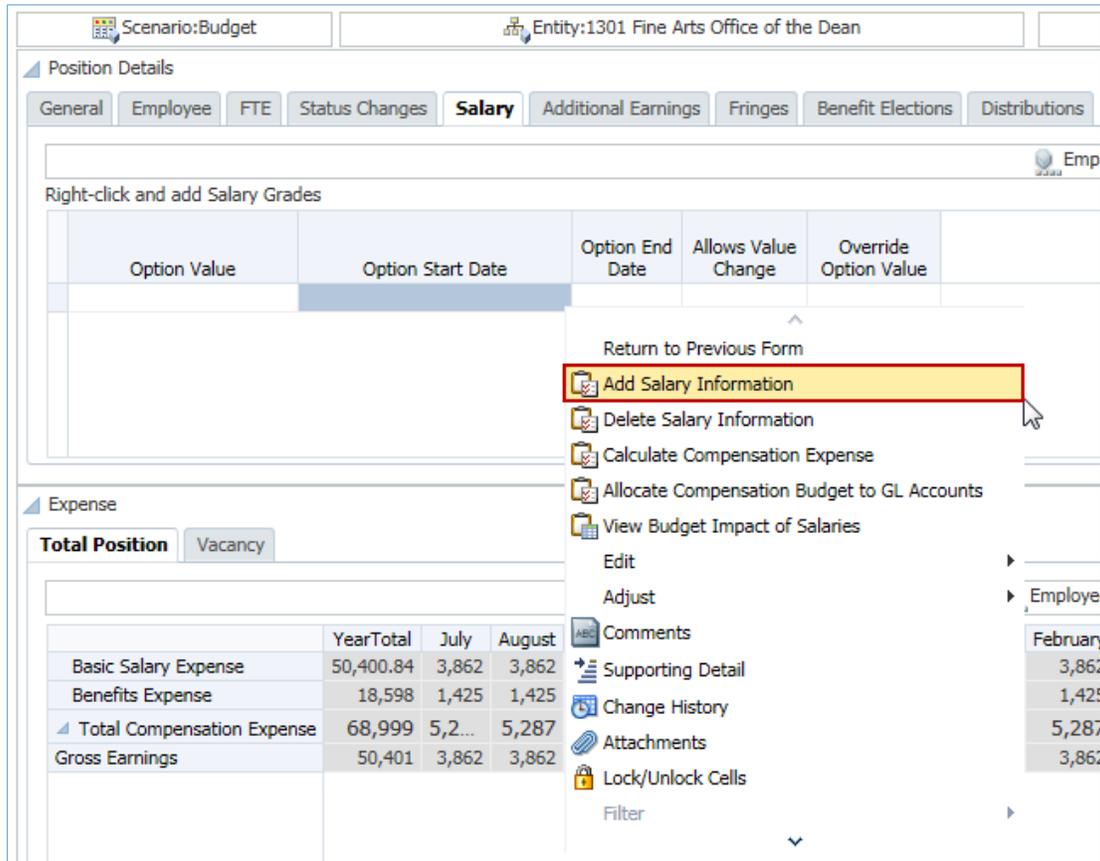


11. Go back to the **Salary** tab and **right-click** on any of the cells in the Position Details section.

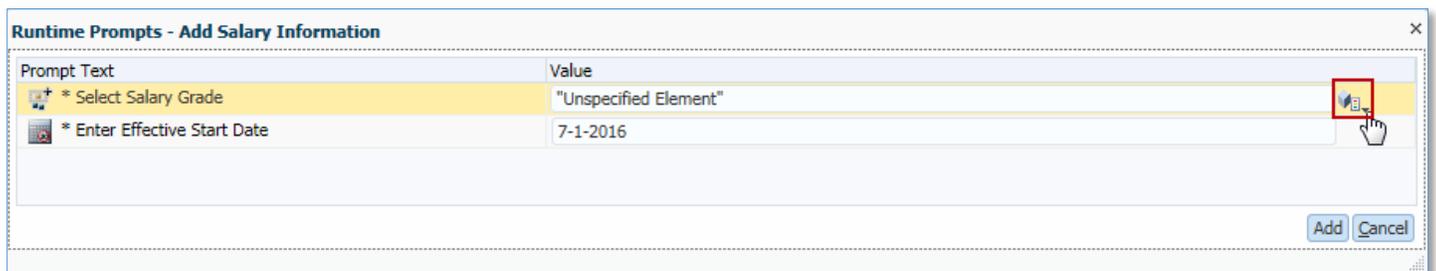
12. Click **Delete Salary Information**.



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



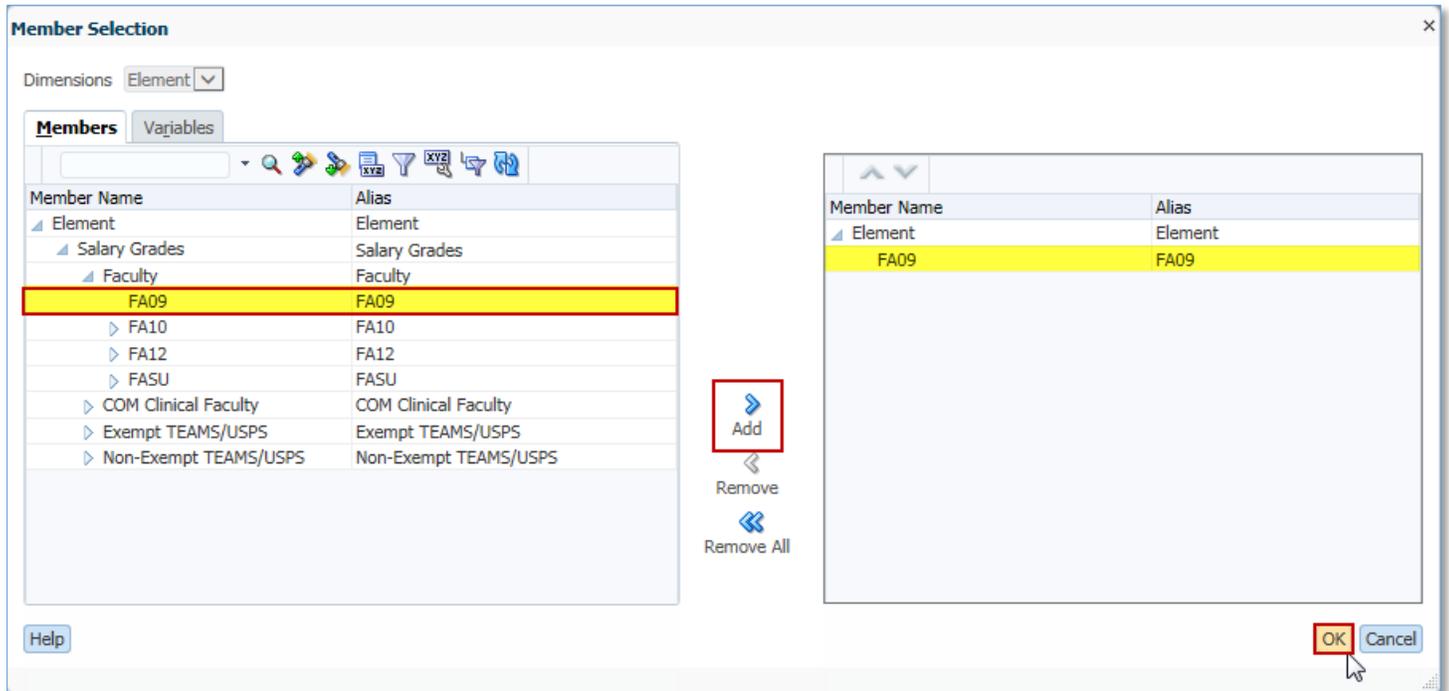
14. Click the **Salary Grade Select Members** icons to search for and locate the appropriate salary grade for this position.



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.

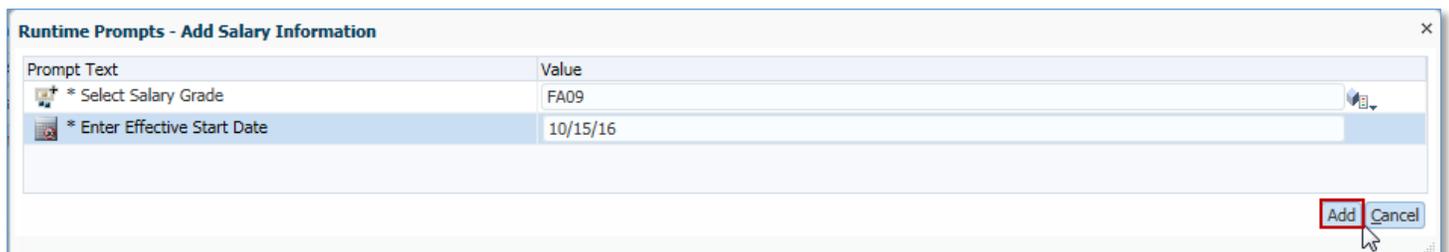
16. Once the Salary grade is chosen, click the right arrow to send it over to the **Element area** on the right hand side and then click **OK**.



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**.

The screenshot shows the 'Position Details' window with the 'Salary' tab selected. A table contains the following data:

	Option Value	Option Start Date	Option End Date	Allows Value Change	Override Option Value
FA09 1st Element Change	0	10/15/16		Yes	0

A right-click context menu is displayed over the table, with the following options:

- Return to Previous Form
- Add Salary Information
- Delete Salary Information
- Calculate Compensation Expense** (highlighted in yellow)
- Allocate Compensation Budget to GL Accounts
- Edit
- Adjust
- Comments
- Supporting Detail
- Change History
- Attachments
- Lock/Unlock Cells
- Select All
- Data Validation Messages

A red arrow points to the 'Option Value' cell with the text "Right click here".

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

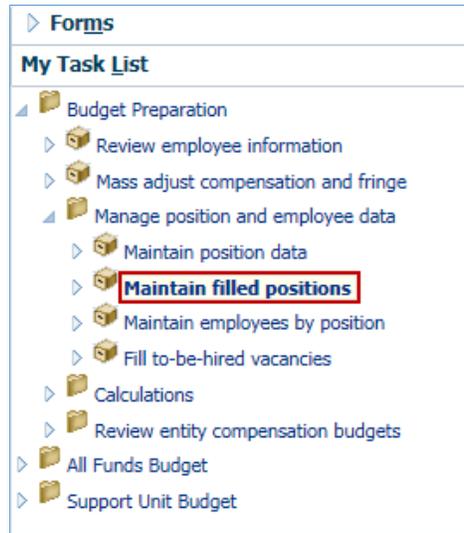
The screenshot shows the 'Position Details' window with the 'Fringes' tab selected. A table contains the following data:

	Option Value	Override Option Value	Option Start Date	Option End Date	Value Type Input	Allows Value Change	Value Type
Fringe_Faculty	26.9	26.9	10/15/...		Percentage of Overall Earnin...	No	Percentage of Overall Earnin...
Fringe_Non-Benefit_Earnings	7.6	7.6	7/1/13		Percentage of Other Earnings	No	Percentage of Other Earnings

A red arrow points to the 'Fringe_Faculty' row.

Promote an Individual

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

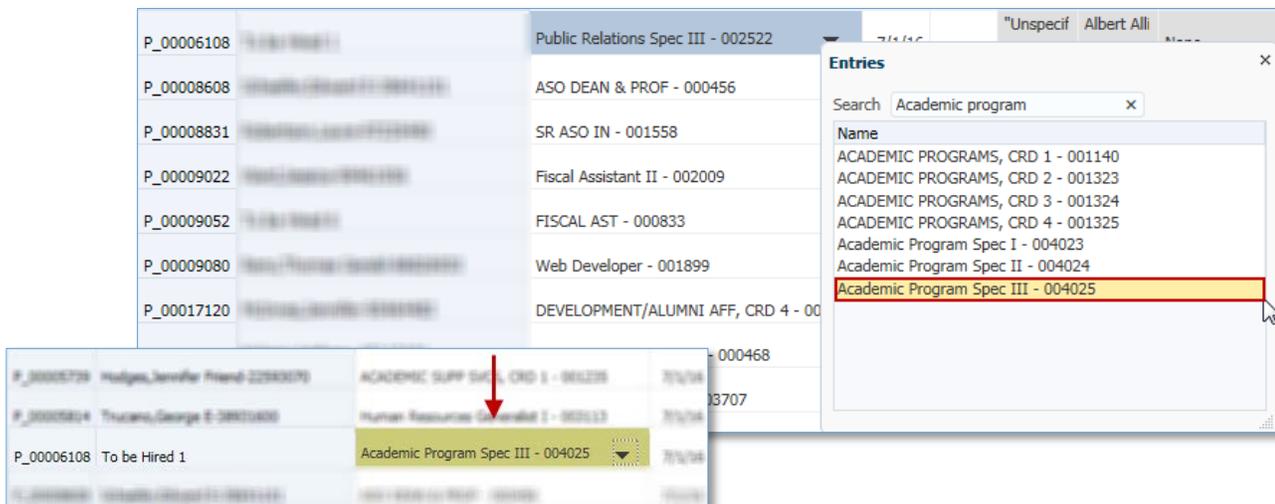


22. Click on the job name and select the drop down arrow.

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

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

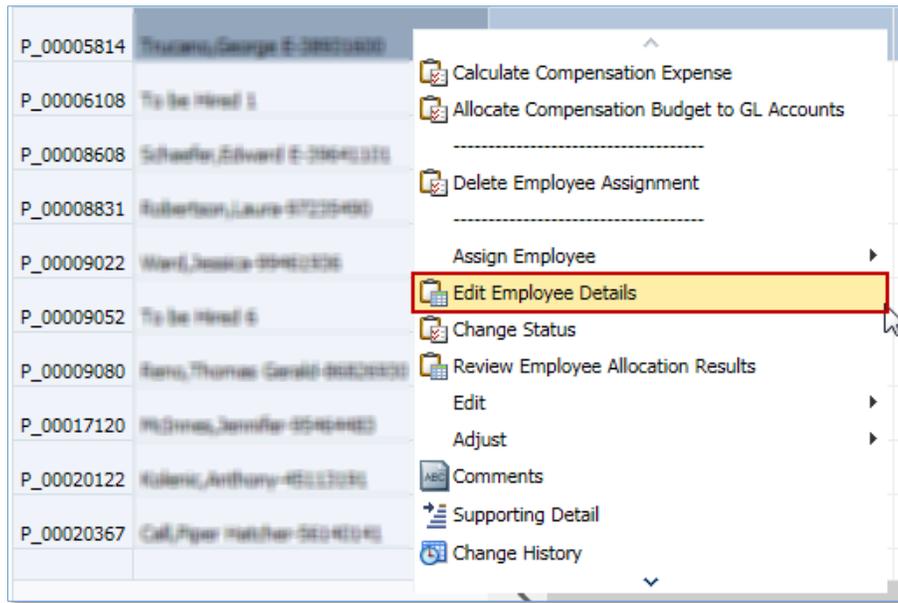
NOTE: The cell may flash to yellow to indicate a recent edit has not yet been saved.



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/>