![UF Training & Organizational Development, Human Resources, UNIVERSITY of FLORIDA logo]

Status Change

Assigning an Existing Employee

In some instances, you may have an employee leave a position in the middle of the coming fiscal year. Proactively, you may choose to hire someone for that position prior to the first employee's departure to. There may be some overlap of the two employees during the transition period for succession training.

Follow the procedures below to change the existing employee's status to "inactive;" assign the new employee to the position (if he/she is an existing employee); distribute the new employee; and run the two calculations.

1. Navigate to: **My Task List > Budget Preparation > Manage position and employee data > Maintain filled positions**.
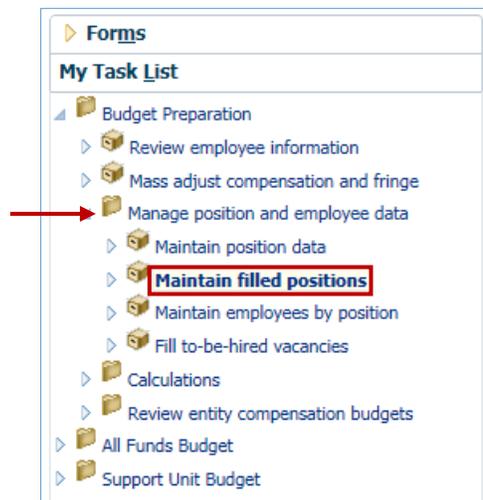
2. **Right-click** the relevant employee for which you are changing the status.

3. Click **Edit Employee Details**.

4. Click the **Status Changes** tab.

5. **Right-click** the assignment you wish to change.

6. Click the **Change Status** option.
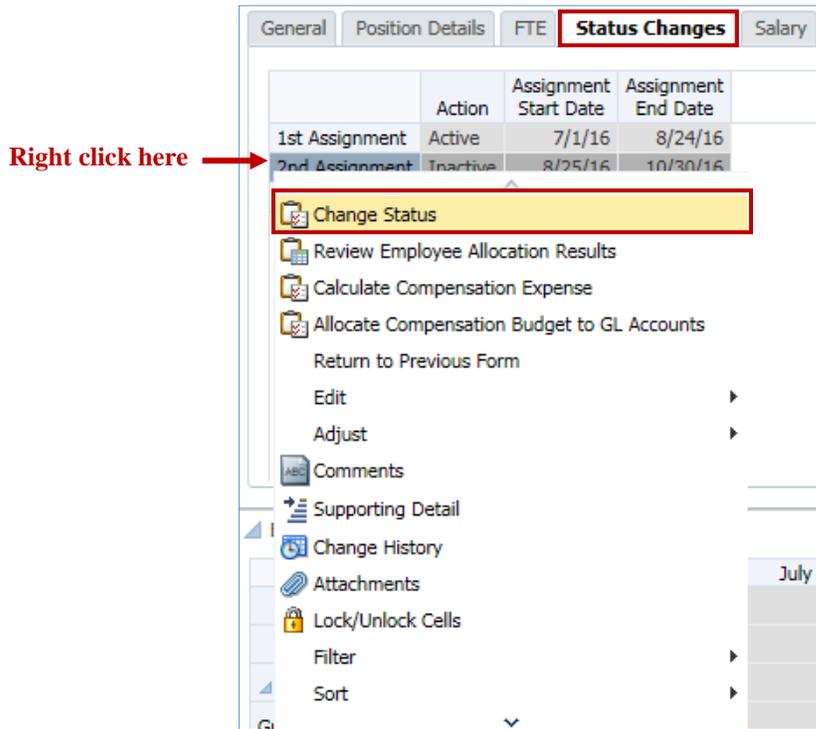
7. Double-click the **Select Status** drop down field.

8. Click the appropriate status (e.g., **Inactive**).

9. Enter the desired information into the **Enter Effective Start Date** field. (e.g., "10/31/2016") and **Enter Effective End Date** as appropriate. If this employee is retired, terminated or leaving the position, make Effective End Date blank.

10. Click the **Change** button.

11. **Right-click** anywhere on the form to bring up the pop-up menu.

12. Click the **Calculate Compensation Expense**. Then click **Allocate Compensation to General Ledger Accounts.**
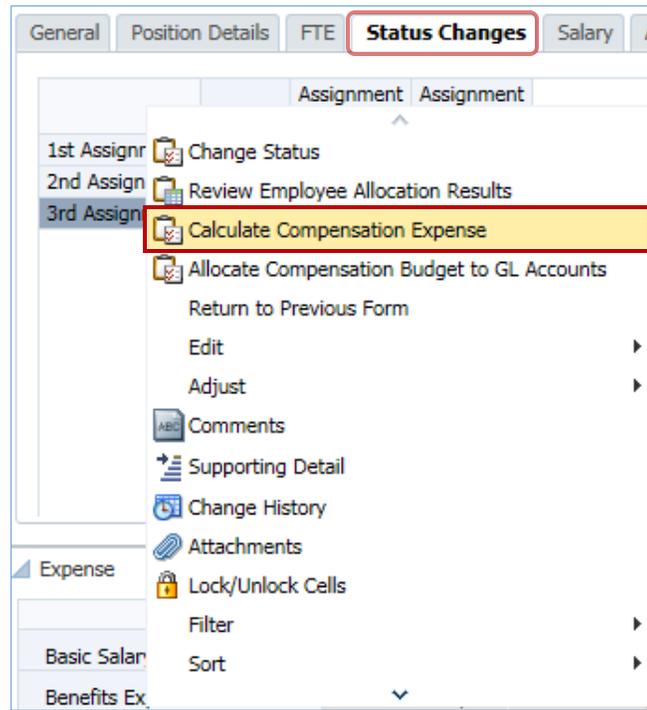
13. **Right-click** to access the pop-up menu.

14. Click the **Return to Previous Data Form** option.
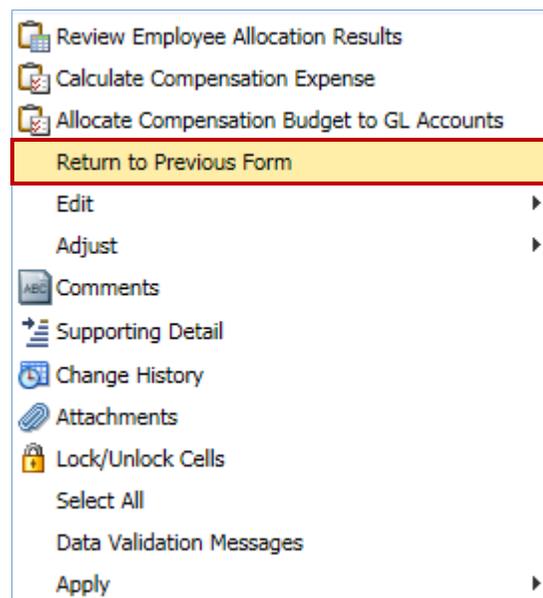
Assigning an Existing Employee

You can now assign a new employee to the inactive position to start on a particular date.

15. **Right-click** the appropriate position row.

16. Point to **Assign Employee**.

17. Click **Assign Existing Employee**.

18. Enter the desired information into the **Select Employee** field (e.g., "UFID_**41830000**".)

    Important! Be sure to remove the quotes that appear around the UF ID.

19. Enter the appropriate date. Review and Update Union Code.

20. Click the **Assign** button.
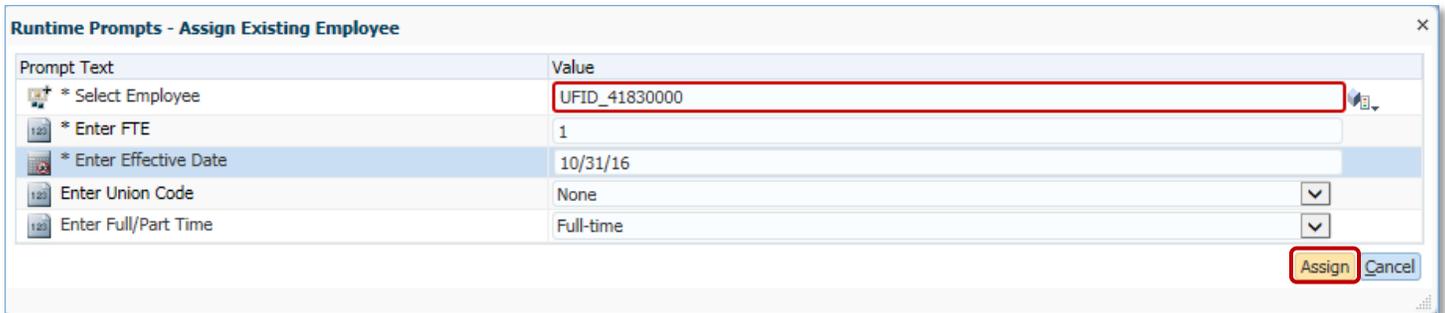
Distributing the Employee

Once you add the employee, you now need to setup the distribution.

21. **Right-click** on newly added employee.

22. Click **Edit Employee Details**.

23. Click the **Salary** tab.

24. Click the **Override Option Value** field.

25. Enter the salary information.
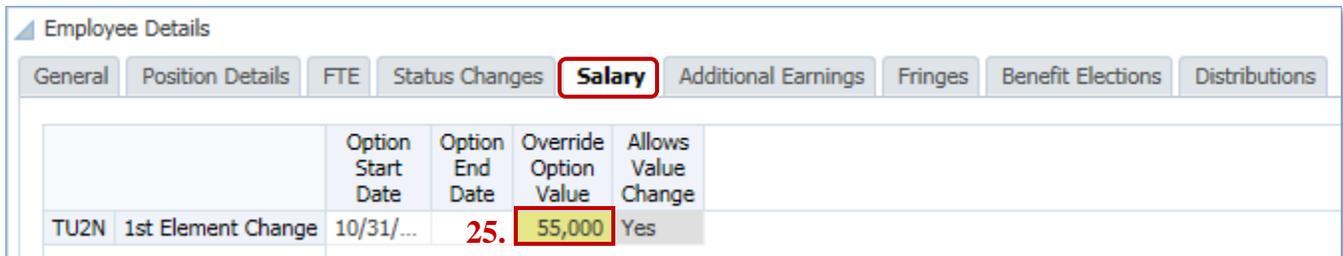
		Option Start Date	Option End Date	Override Option Value	Allows Value Change			
TU2N	1st Element Change	10/31/...	**25.**	55,000	Yes			

26. Click the **Save** button.

27. Click the **Distributions** tab.

28. Right-click on form to bring up pop-up menu.

29. Click **Add Distribution Information**.

30. Change the **Effective Start** and **End Dates** as appropriate.

31. Click **Add** button.
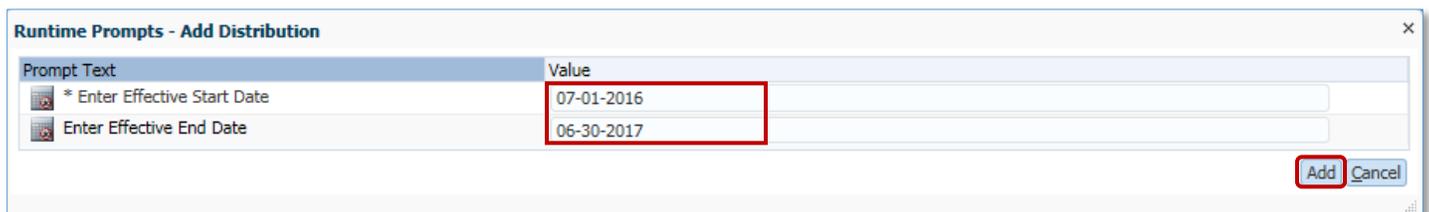
Prompt Text	Value
* Enter Effective Start Date	07-01-2016
Enter Effective End Date	06-30-2017

Add Cancel

32. Double-click the **Entity Segment** drop down field.

33. Enter or search for appropriate Entity.

34. Select desired Entity.

35. Double-click the **Fund Segment** drop down field.

36. Enter or search for appropriate FundBudRefSOF.

37. Select desired FundBudRefSOF option.

38. Double-click the **Program Segment** drop down field.

39. Enter or search for the appropriate Program.

40. Select desired Program. Scroll to right, if needed.

41. Enter appropriate percentage in **Percentage Allocation** field.

42. Click the **Save** button.

	Entity Segment	Fund Segment	Program Segment	Dept Flex Segment	Allocation Start Date	Allocation End Date	Percentage Allocation
1st Allocation	D_01000000	111-CYFWD...	PRG_2000	No Dept Flex	7/1/16	6/30/1...	100

32.   **35.**   **38.**   **41.**

Calculating Compensation

After making the changes, it's important to calculate the compensation. You can run the two calculations on the individual employees or run by entity. Follow the steps below if you run by entity. Make sure to select the proper values based on your situation.

43. Click the **Calculations Expand** icon.

44. Click in the **Calculate compensation budgets** rule.

45. Click the **Launch** button.
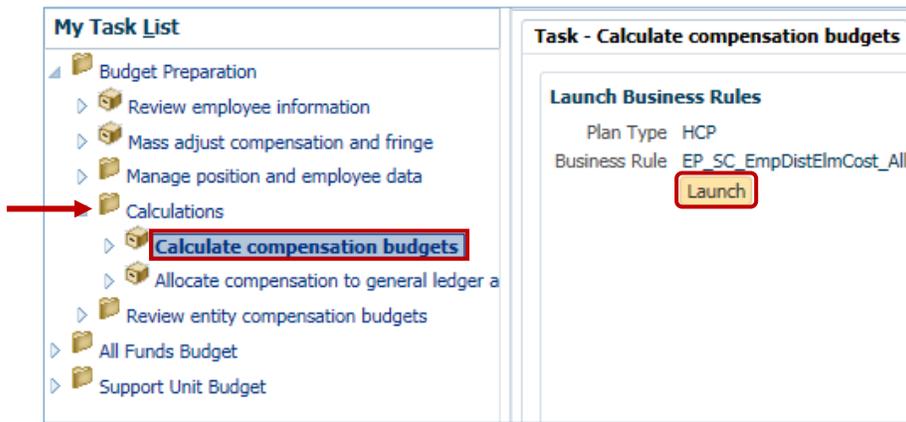
46. Select proper values for Version, Scenario and Entity. Click the **Launch** button.
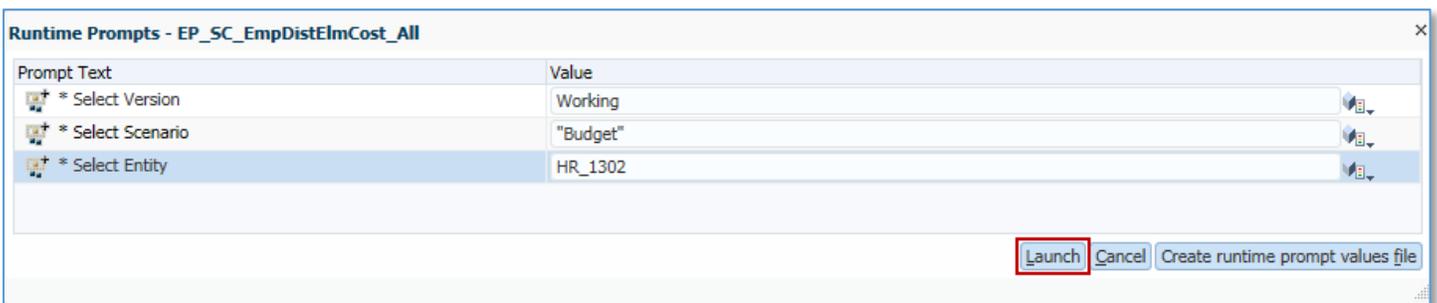
47. Click on the Allocate compensation to general ledger accounts rule.

48. Click the **Launch** button.
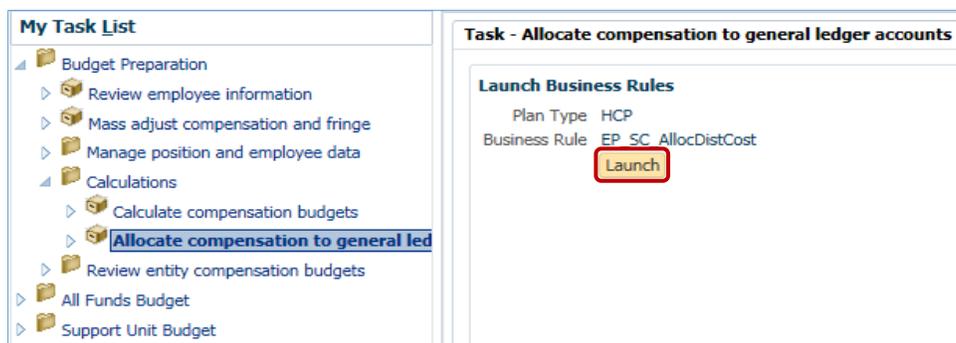
49.   Fill appropriate values in the prompts and click the Launch button.

Runtime Prompts - EP_SC_AllocDistCost		✕
Prompt Text	**Value**	
📇⁺ * Select Employee	EMP_1302	🔽
📇⁺ * Select Entity	HR_1302	🔽
📇⁺ * Select Position	POS_1302	🔽
📇⁺ * Select Scenario	Budget	🔽
📇⁺ * Select Version	Working	🔽
	Launch Cancel Create runtime prompt values file	

Refer to the Calculation per Entity Instruction Guide for more details on the criteria selections.

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/