

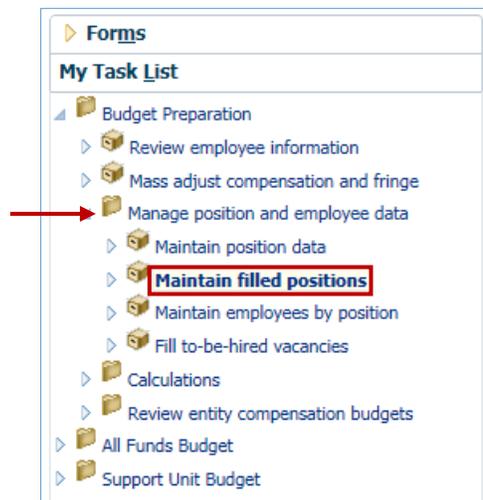
Status Change

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.**

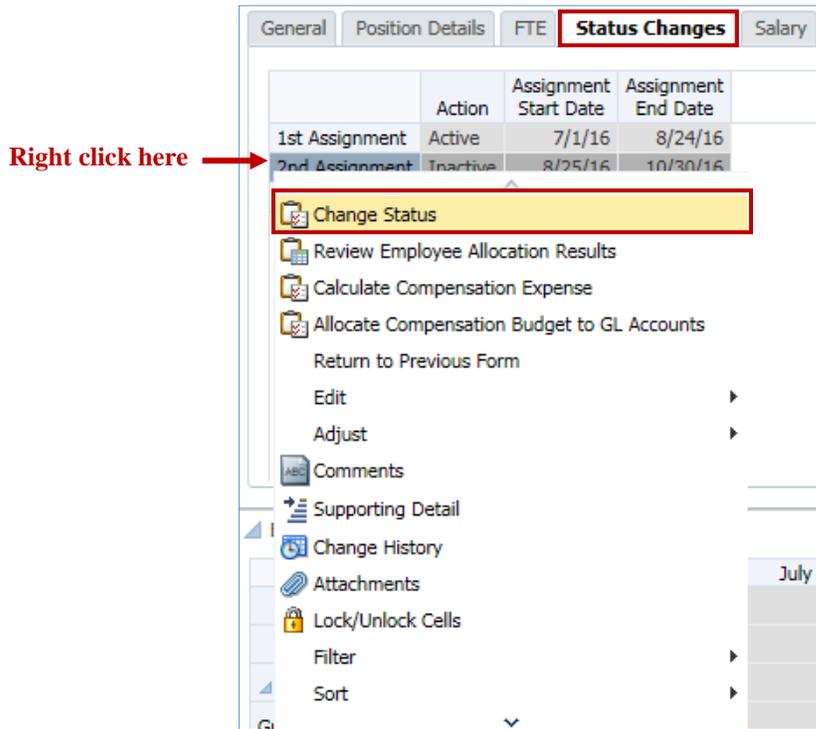


2. **Right-click** the relevant employee for which you are changing the status.
3. Click **Edit Employee Details**.

		Job	Posi Sta Da
P_00005739	Releford,Cyrus P-00101001	ACADEMIC SUPP SVCS, CRD 1 - 001235	7/1
P_00005814	Estevido,Charlize B-33000661		
P_00006108	To be Hired 1		
P_00008608	Sorel,Cherie S-20222200		
P_00008831	Tress, George E-99343349		
P_00009022	Thoms,Rachele 1561165170		
P_00009052	To be Hired 6		
P_00009080	Dai,Minh 98979695		
P_00017120	Sumlin, Janise P 11010110		
P_00020122	Moody,Alyssa E -81888118		
P_00020367	Keating,Analise - 19681432		
P_00021200	Rockford,Harold -52252525		

- Calculate Compensation Expense
- Allocate Compensation Budget to GL Accounts
-
- Delete Employee Assignment
-
- Assign Employee
- Edit Employee Details**
- Change Status
- Review Employee Allocation Results
- Edit
- Adjust
- Comments
- Supporting Detail
- Change History

4. Click the **Status Changes** tab.
5. **Right-click** the assignment you wish to change.
6. Click the **Change Status** option.

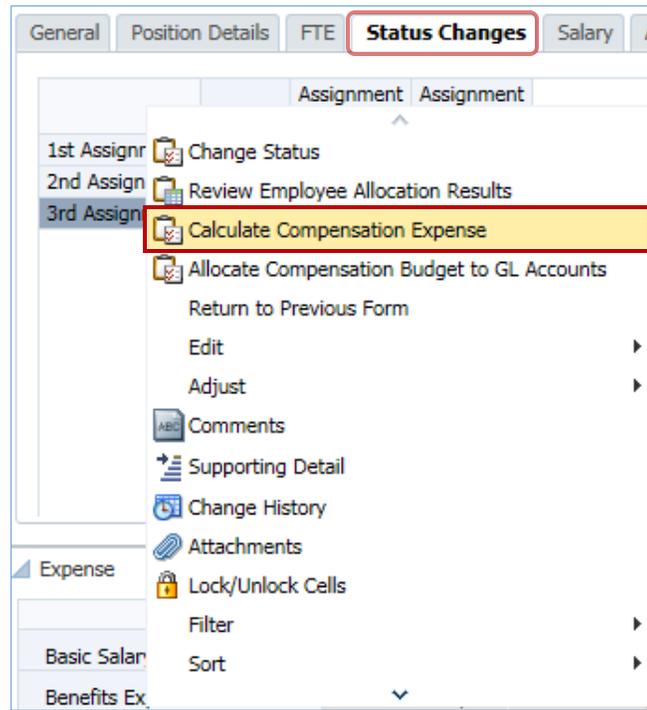


7. Double-click the **Select Status** drop down field.
8. Click the appropriate status (e.g., **Inactive**).
9. Enter the desired information into the **Enter Effective Start Date** field. (e.g., "10/31/2016") and **Enter Effective End Date** as appropriate. If this employee is retired, terminated or leaving the position, make Effective End Date blank.
10. Click the **Change** button.

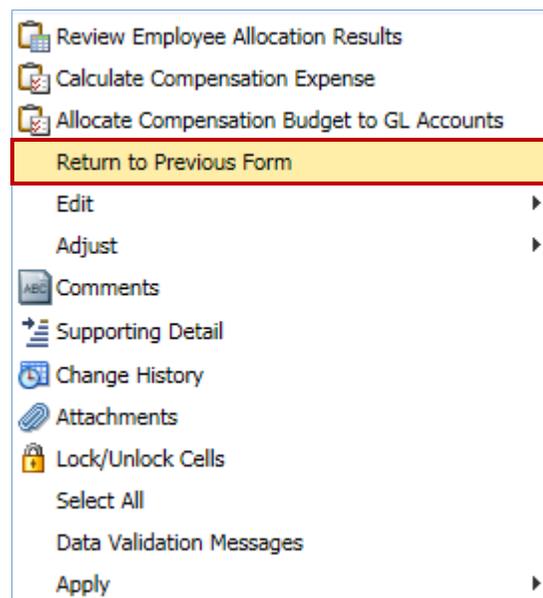
Prompt Text	Value
* Select Status	8. Inactive 7. <input type="button" value="v"/>
* Enter Effective Start Date	9. 10/31/16
Enter Effective End Date	

10.

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**.

	Job	Position Start Date	Position End Date	Employee Number	Employee Name
P_00005739	Releford, Cyrus P-00101001	7/1/16		UFID_22!	
P_00005814	Estevido, Charlize B-33000661	7/1/16		UFID_38!	
P_00006108	To be Hired 1	/16		"Unspecif	
P_00008608	Sorel, Cherie S-20222200	/16		UFID_39!	
P_00008831	Tress, George E-99343349	/16		UFID_97!	
P_00009022	Thoms, Rachele 1561165170			UFID_99!	
P_00009052	To be Hired 6				
P_00009080	Dai, Minh 98979695	/16		UFID_86!	
P_00017120	Sumlin, Janise P 11010110	/16		UFID_95!	
P_00020122	Moody, Alyssa E -81888118	/16		UFID_45!	
P_00020367	Keating, Analise - 19681432	/16		UFID_56!	
P_00021200	Rockford, Harold -52252525	/16		UFID_58!	

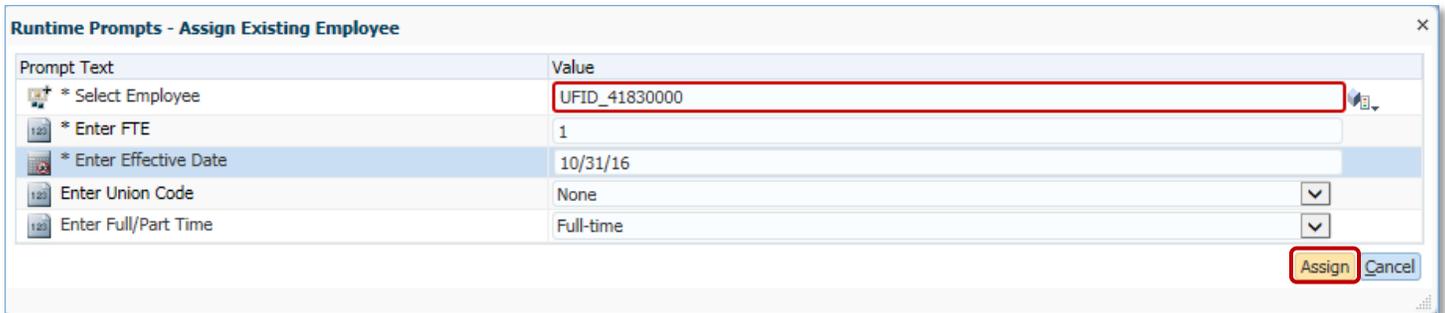
A red arrow points to the row for P_00005814 with the text "Right click here". A context menu is open over this row, with "Assign Employee" highlighted in yellow. A sub-menu is open for "Assign Employee", with "Assign Existing Employee" highlighted in red.

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.



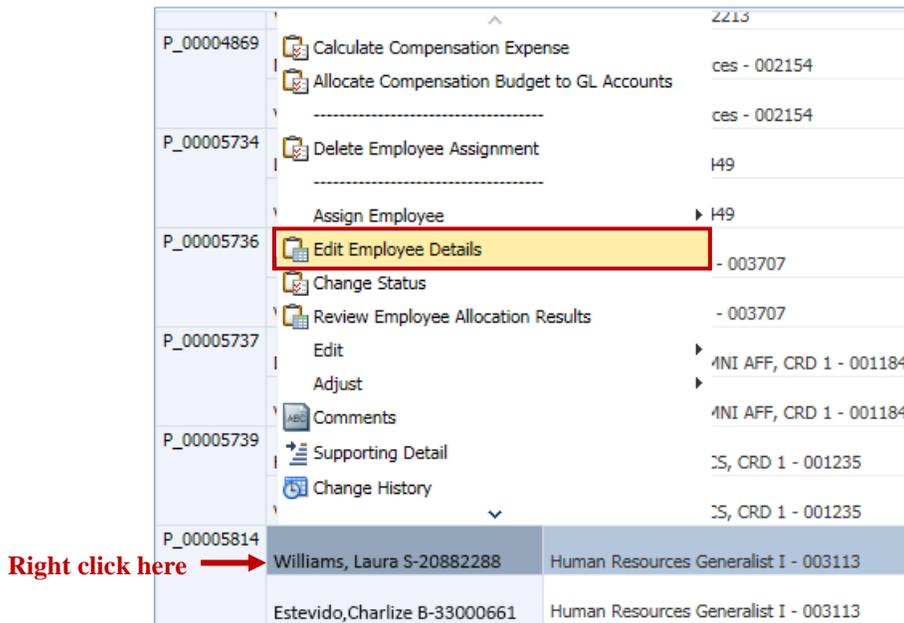
Prompt Text	Value
* Select Employee	UFID_41830000
* Enter FTE	1
* Enter Effective Date	10/31/16
Enter Union Code	None
Enter Full/Part Time	Full-time

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**.



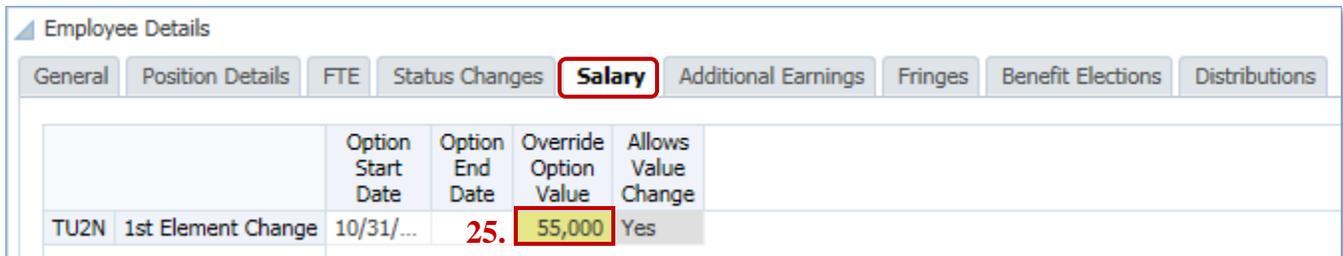
P_00004869	Calculate Compensation Expense	ces - 002154
	Allocate Compensation Budget to GL Accounts	ces - 002154
	-----	ces - 002154
P_00005734	Delete Employee Assignment	H49

	Assign Employee	H49
P_00005736	Edit Employee Details	- 003707
	Change Status	- 003707
	Review Employee Allocation Results	- 003707
P_00005737	Edit	4NI AFF, CRD 1 - 001184
	Adjust	4NI AFF, CRD 1 - 001184
	Comments	4NI AFF, CRD 1 - 001184
P_00005739	Supporting Detail	CS, CRD 1 - 001235
	Change History	CS, CRD 1 - 001235
P_00005814	Williams, Laura S-20882288	Human Resources Generalist I - 003113
	Estevido, Charlize B-33000661	Human Resources Generalist I - 003113

23. Click the **Salary** tab.

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

25. Enter the salary information.



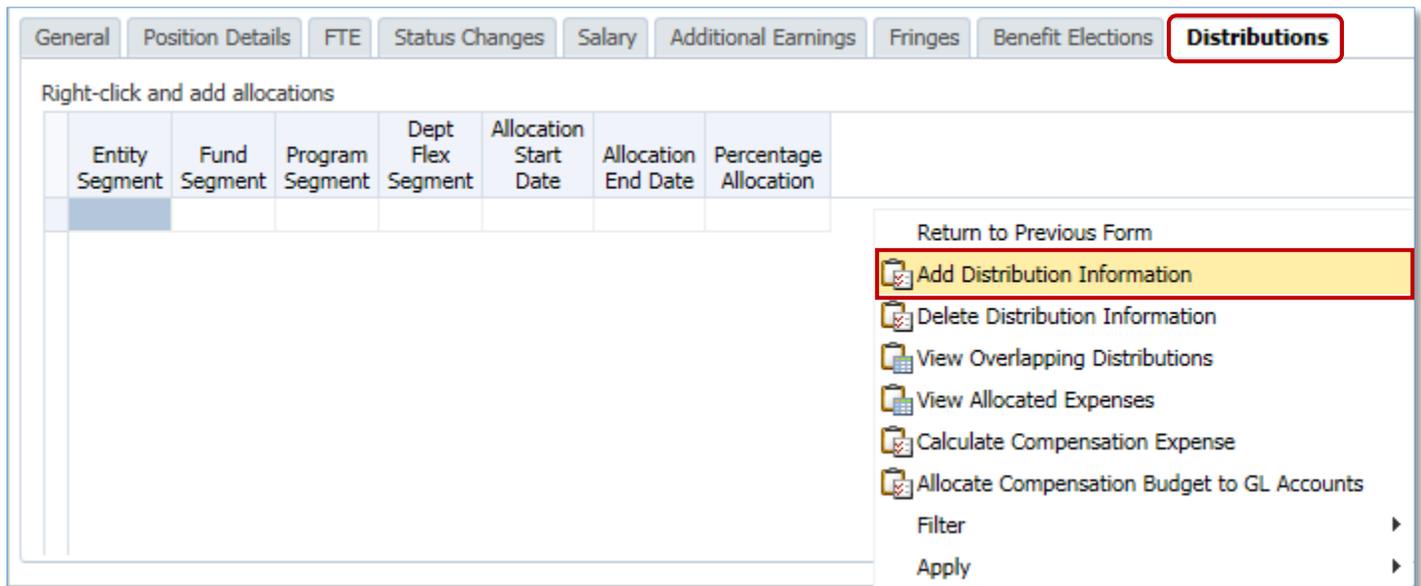
The screenshot shows the 'Employee Details' window with the 'Salary' tab selected. A table contains the following data:

		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.



The screenshot shows the 'Employee Details' window with the 'Distributions' tab selected. A table with the following headers is visible:

Entity Segment	Fund Segment	Program Segment	Dept Flex Segment	Allocation Start Date	Allocation End Date	Percentage Allocation

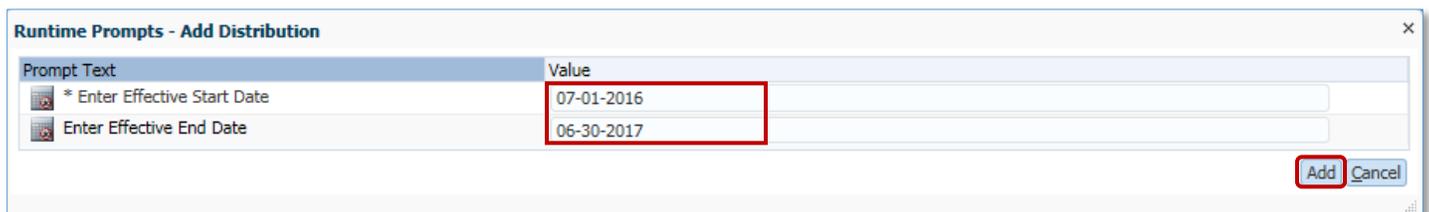
A context menu is open over the table, listing the following options:

- Return to Previous Form
- Add Distribution Information** (highlighted)
- Delete Distribution Information
- View Overlapping Distributions
- View Allocated Expenses
- Calculate Compensation Expense
- Allocate Compensation Budget to GL Accounts
- Filter
- Apply

29. Click **Add Distribution Information**.

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

31. Click **Add** button.



The screenshot shows a 'Runtime Prompts - Add Distribution' dialog box with the following data:

Prompt Text	Value
* Enter Effective Start Date	07-01-2016
Enter Effective End Date	06-30-2017

Buttons for 'Add' and 'Cancel' are visible at the bottom right.

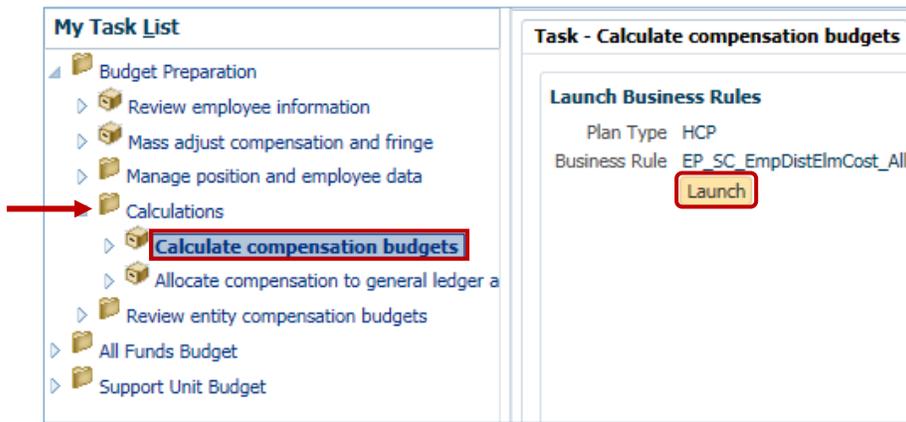
32. Double-click the **Entity Segment** drop down field.
33. Enter or search for appropriate Entity.
34. Select desired Entity.
35. Double-click the **Fund Segment** drop down field.
36. Enter or search for appropriate FundBudRefSOF.
37. Select desired FundBudRefSOF option.
38. Double-click the **Program 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.

General	Position Details	FTE	Status Changes	Salary	Additional Earnings	Fringes	Benefit Elections	Distributions
	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.	

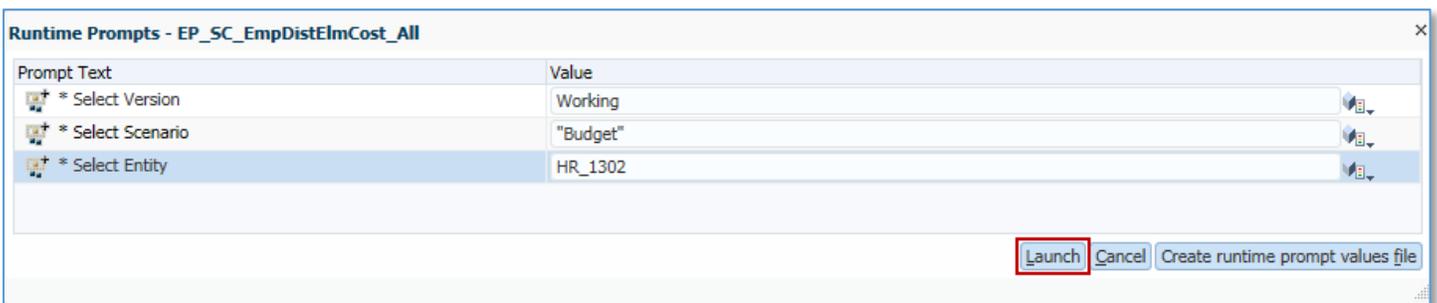
Calculating Compensation

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.

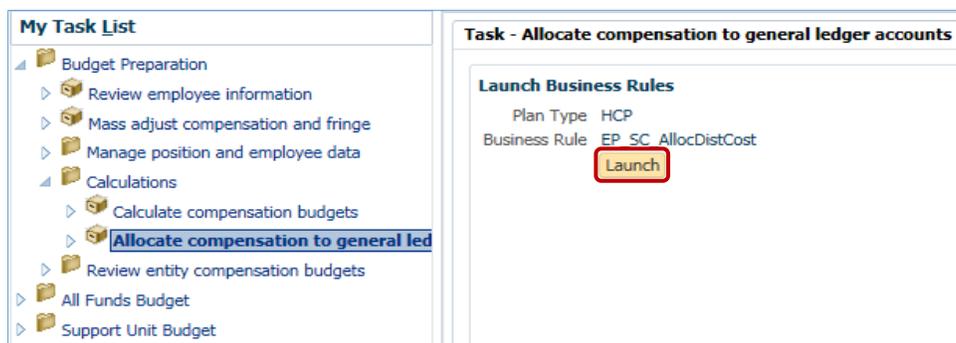
43. Click the **Calculations Expand** icon.
44. Click in the **Calculate compensation budgets** rule.
45. Click the **Launch** button.



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.

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/>