HR User FAQ – Managing Positions and related Employee Changes

Why can't I just change the job profile on the position for the employee?

SPMS uses position management. This means job information comes from the position. A change to Position (chair) is needed before the change to the employee

How do I make the change to the position to reflect a different job profile?

There are reclassification reasons for the position (Edit Position Restriction) that will process a change in the job profile, some requiring approval of CAS and some requiring certain documents be attached.

Chart of Reclassification Reasons *(CAS)*

Edit Position Restriction Reason	Description	Reviewed by CAS? (Y/N)	MS-22 (Position Description)	MS-52 (Benchmark Requests)	MS-44 (Supervisory Questionnaire)	MS-2024 (Request for Position Classification Study)
Reclassification > Benchmark	Approved agency benchmark position reclassifications	N				
Reclassification > Benchmark Study	Request a study of a Position Description for Benchmark approval	Y	x	x		
Reclassification > Reclassification Study	Request a reclassification study of the job duties and responsibilities assigned to a position.	Y	x		x	x
Reclassification > Non Competitive Promotion	Used to reclassify certain positions in approved Non-Competitive Promotion classifications in a classification series	N				
Reclassification > Special Condition	Used by agencies with salary setting authority or other conditions	N				
Reclassification > Vacancy Downgrade	Used to downgrade a position within the same classification series	N				

What are some important fields to review during an Edit Position Restriction Reclassification process?

- **Job posting title**:
  - Must be *manually updated* to coordinate with the new job profile
  - Needs to *reflect the job profile*

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- If an internal title is needed, it can be captured on the *Business Title* on the *employee*
- **Dates**: *Availability* vs *Earliest Hire* date
  - The *Availability Date* shows when the position was <u>first</u> made available for use, entered at the time the PIN was created.
  - The *Earliest Hire Date* is the effective date for the EPR changes.
    <mark>**Important Note**</mark>: When viewing the *Edit Position Restriction*: the date displayed is *NOT the effective date*, but <u>the processing date</u>
- **Job families**: Do NOT make changes to the *Job Families* that are connected to the Job profile that you select.
- **Job profile** - Stay in the same series!!!
- **Time Type** needs to be changed if a position is no longer Full or Part time
- **Worker Type** and **Sub-type** *must match*:
  - ***Cannot*** change a Contingent pin to Employee and vice versa
  - ***Cannot*** change a Contractual pin to State Regular or Temporary and vice versa

What are important reminders about the Position Freeze Process?

Job Aid: Manage Position Freeze

- DBM reviews and <u>freezes positions as they are vacated.</u>
- DBM <u>does not start the Unfreeze process.</u>
- Cannot future date an unfreeze
- To start a recruitment, the PIN must be unfrozen, using the "DBM Budget Unfrozen" reason in the transaction
- To identify frozen positions:
  - Run the **SPMS View All Positions** report for agency wide search.
  - In a specific Sup Org > **Unavailable to Fill** tab

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What is the process for Splitting and Reconsolidating a Position?
Quick Guide: [Split a Pin](#)

Splitting a Position Transaction is used to take a PIN (usually Full Time) and split it into two (or more) Part Time positions.

Quick Guide: [Reconsolidate Positions](#)

Reconsolidating a Position Transaction is used combine two Part time PINs into One PIN with a higher Authorized %.

What are the Organization Assignment fields shown on the Position and the Employee?
Job Aid: [Change Organization Assignments](#)

On the Position
- State customized fields used for the identification of attributes specific to a Position based on the creation request.
- Information initially entered on the Create Position process
- Can be found on the Position under ==Position Overview==
- Using old requisitions can cause validation errors during the Hire process for employees, based on Organization Assignments that were originally allocated to the PIN.
  - ***ALL REQUISITIONS SHOULD BE CORRECTED OR CREATED BEFORE STARTING A RECRUITMENT.***

On the Employee
- Information initially defaults from the Position
- This data can be changed per employee, but will revert back if an employee leaves a position

- If the PIN's information was "overridden" by the previous Employee, the next employee will have the PIN original information defaulted to them, <u>NOT the previous employee's information.</u>
- Can be found in the Employee Profile : <mark>*Job Tab > Organizations*</mark>

What are the required Organizational Assignment fields for a position to advance through the process?

- **Authorized By** – Select appropriate
- **Bargaining Status** – review after any changes to ensure accuracy (manual adjustment)
- **Budget Status** – confirm with budget team
- **Retirement System** - Select appropriate
- **Authorized %** - confirm with budget, (text field, not FTE)

What is the Job Change Process and how is it used?

Job Change Process allows you to change attributes of an active employee:

- Used to transfer, promote, demote, reflect the reclassification of the position or change the current data of an employee (FTE, Location, etc.)
- Process should be started in JobAps for transfer, promotion, or demotion.

How does the Change Job Process work with the EPR Process on a Filled Position (with an employee)?

Job Aid: [Change Job](#)

- When a position is filled, HRC's must complete the change to the position first, and then complete a change Job transaction immediately following for the change to reflect on the employee side of the system.
- The necessary **Change Job** process will show up in your inbox as a sub process of the EPR.

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- After Edit Position Restriction is completed on the Position, the employee **does not automatically change**
- **Effective date** of employee's changes should be <u>on the date for earliest hire date </u>on the EPR
- **Use the same reason** that was processed on the EPR for the Change Job for the employee: <u>Reclassification</u>
- **Use the same job profile** for the Employee as the job profile for the Position. You will receive an error if you don't.
- **When the employee vacates the position**, any new employee who fills it, will have the information default from the pin
  - *For example: If a level 1 job profile for an employee (but the position reflects a level 2 job profile) wasn't changed to match the position, when the position is vacated, the requisition will reflect the level 2 status that was processed on the Position (since go-live validations have been placed to avoid this in the future)*

What are important reminders about the Job Change Process and their impact throughout the system?
- <u>Do not change location or the "Team".</u> You cannot combine steps such as location or Sup Org changes. One change at a time.
- <u>If the Position should be in a different Sup Org</u>, send a move worker ticket before or after the completion of the Job Change transaction.
  - *The pin will only be available to select from its current Sup Org*
- <u>Always review the Salary Schedule </u>during the Compensation step to verify if changes may be needed to bargaining status.
- Any employee change from State/Regular to Contractual or vise versa or an FTE% Data Change will result in a *Change Benefit Job* event that could trigger a *Benefit Change – Job Change* event that requires the employee to go into Workday and take action.
- Verify that employees go into Workday to complete any open benefit event.

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What are important things to pay attention to when adjusting an Employee's FTE%?

Quick Guide: Maintaining FTE%

- **Only** change *Scheduled Hours*.

- *Location Weekly h*ours and *Default Weekly* hours stay at 40

- **Remember** to change the <u>Time Type </u>at the same time if the Scheduled hours move up to 40 or dip below 40.

- **The FTE% is used** throughout the system and affects multiple aspects of the employee's employment benefits:

- Salary amount; Time accrual; Holiday Pay; Benefits

- **Benefits and FTE**

- When *State/Regular* FTE% goes below 50% part-time then they are **<u>no longer eligible for subsidy</u>**

- When *Contractual employee's* FTE% falls below 75%, they **<u>move from ACA to nonACA</u>**.

- Same for when their multiple-contract FTE% combination goes below 75%

What are some Helpful SPMS Reports when processing EPR and Job Change transactions in the Workday system?

- ***SPS Benefit Open Election* Events – Employees** – run by ABCs

- ***SPS Benefit Open Enrollment Events – Employees*** – run by ABCs

- *SPMS Current Employee Detail Report*

- *SPMS Reclassifications Awaiting Action*

- *SPMS Reclassifications Completed*

- *SPMS All Transactions Completed*

- *Business Processes of Type Awaiting Action*