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## Promotion

### Concept

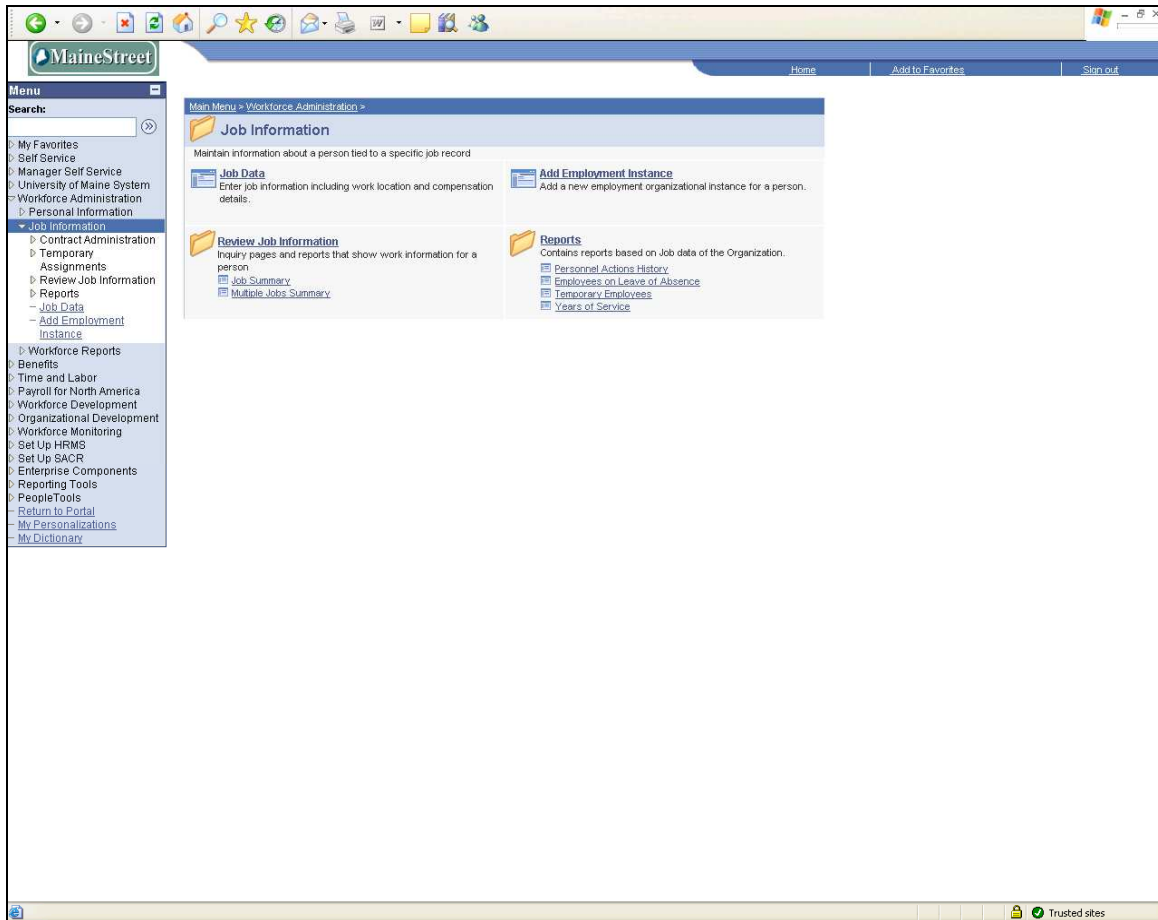
A promotion usually involves moving an employee to a new position and an increase in compensation.

NOTE: For changes to Business Unit, Department and/or Location, see the process.

Additional Information:

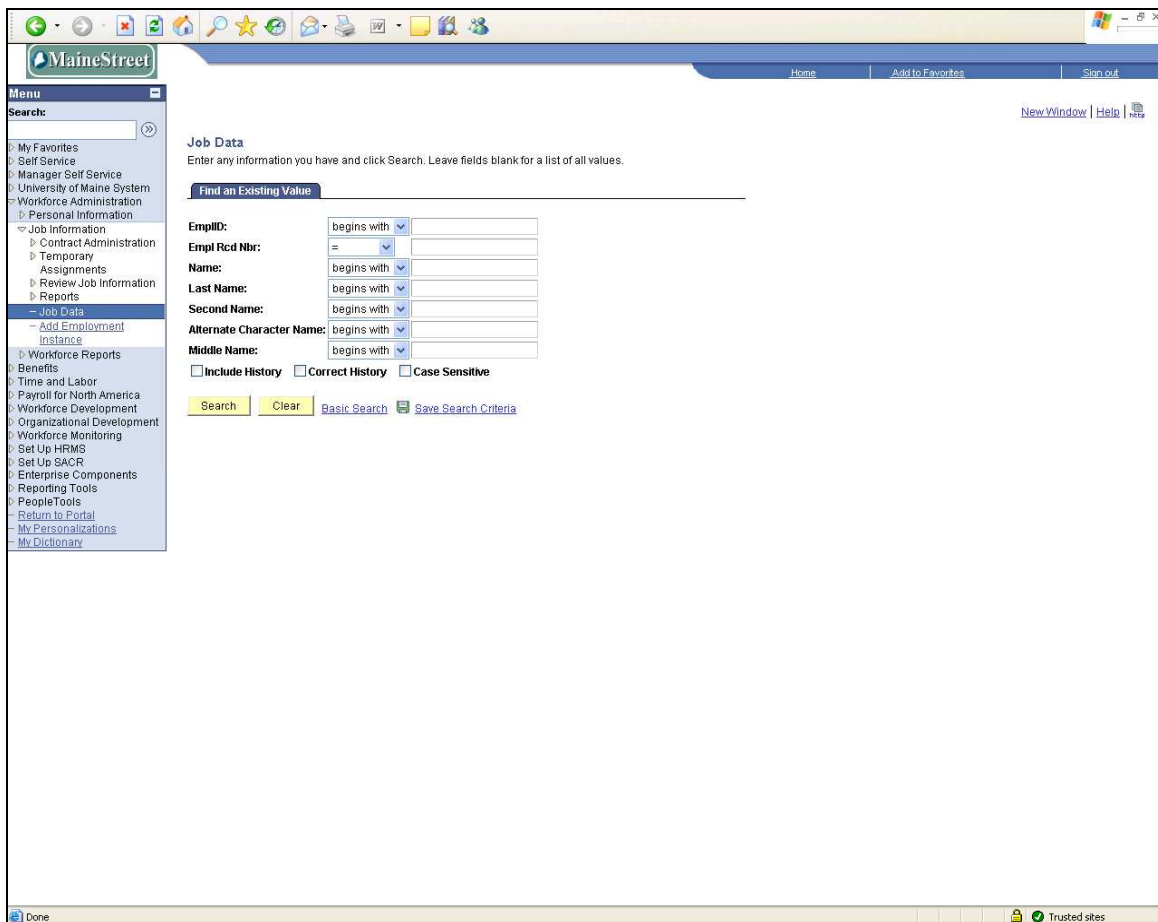
- If the promotion results in a change in benefits eligibility, review the **Benefits Program Participation** page and make any necessary changes.
- Check **Time Reporting, Enrollment and Termination** process for Time and Labor setup, if workgroup changes.
- Review **Detail Distribution** page for accurate distribution of earnings.
- Review **Payroll Check Distribution** process if check distribution changes.

### Navigation:



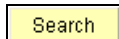
- | Step | Action                                          |
|------|-------------------------------------------------|
| 1.   | Click the <b>Workforce Administration</b> link. |
| 2.   | Click the <b>Job Information</b> link.          |
| 3.   | Click the <b>Job Data</b> link.                 |

### Procedure:



Step	Action
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- To Search for an existing employee, enter EmplID, Name or Last Name. Drop-down menus can be used to select 'begins with', 'contains', etc. to assist in locating an employee. The more information that is entered, the narrower the search and the shorter the search results list for review.
- Click the **Search** button.



If multiple employee records are listed, click on the appropriate employee record to continue.

# Process Document

## HRMS: Promotion



The screenshot shows the HRMS software interface for a promotion process. The user is logged in as Testa Casey (EMP ID: 0099999, Empl Rcd #: 0). The interface includes a navigation bar with tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The main content area displays the 'Work Location' details for the selected employee, including HR Status (Active), Payroll Status (Active), Effective Date (09/07/2008), Sequence (0), and Job Indicator (Primary Job). The Action/Reason is set to Pay Rate Change, and the Promotion list is expanded to show 'Promotion'. Other fields include Last Start Date (04/17/2003), Termination Date, Expected Job End Date (12/31/2099), Position Number (00011022), Position Entry Date (10/27/2004), Regulatory Region (USA), Company (UMS), Business Unit (UMS05), Department (OCES), Location (000101), and Establishment ID (UMS05). The Date Created is 10/29/2008. Below the form are buttons for Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, and Include History.

### Step Action

6. Click the **Plus (+) key** to add a new job row.
7. Enter **Effective Date** of the Promotion.
8. The **Sequence** field defaults to '0'. If the added row has the same effective data as the prior row, the sequence must be changed to the next higher number. Otherwise, do not change.
9. Click the **Drop-down Arrow** to select from the **Action** list.
10. Select **Pay Rate Change** if promotion results in a pay increase.  
Select **Promotion** if no pay increase.
11. Click the **Drop-down Arrow** to select from the **Action/Reason** list.
12. Click the **Promotion** list item.



## Step Action

13. Enter the **Position Number** of the new position.

**NOTE:** If changes were made to the existing position number, blank out the number in the field, tab out of the field, then re-enter the position number. This will update information in the new job row with any changes made on the position data table.

14. Click the **Job Information** tab.

The screenshot shows the HRMS interface for employee Testa Casey (EMP ID: 0099999). The 'Job Information' tab is active, displaying the following details:

- Effective Date:** 09/07/2008
- Effective Sequence:** 0
- Job Indicator:** Primary Job
- Action / Reason:** Pay RT Chg, Promotion, Current
- Job Code:** 0011 Administrative Assistant I
- Entry Date:** 04/17/2003
- Supervisor Level:** 00013750 Assoc Extension Professor
- Reports To:** 0021785 Gary Anderson
- Regular/Temporary:** Regular
- Full/Part:** Part-Time
- Empl Class:** Hourly
- Officer Code:** None
- Regular Shift:** N/A
- Shift Rate:** [ ] / [ ]

Additional sections include 'Standard Hours' (30.00, Weekly, FTE: 0.750000) and 'Contract #' (Contract Number: [ ], Contract Type: [ ]). Navigation buttons at the bottom include Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, and Include History.

## Step Action

15. **Review information for accuracy.**

**Employee Class** may need to be changed to reflect change due to promotion.

Click the **Job Labor** tab.

# Process Document

## HRMS: Promotion



[Work Location](#) | [Job Information](#) | **[Job Labor](#)** | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Testa Casey      EMP      ID: 0099999      Empl Rcd #: 0

**Labor Information**      Find      First 1 of 2      Last

**Effective Date:** 09/07/2008      **Effective Sequence:** 0      **Job Indicator:** Primary Job

**Action / Reason:** Pay Rl Chg      Promotion      Current

**Bargaining Unit:**

**Labor Agreement:**       **Labor Agreement Entry Dt:** 07/05/2003

**Employee Category:**        Stop Wage Progression

**Employee Subcategory:**        Pay Union Fee

**Employee Subcategory 2:**        Position Management Record

**Union Code:** 003      COLT Represented Classified      **Union Seniority Date:** 04/17/2003

**Works Council ID:**       **Labor Facility Entry Date:**

**Exempt from Layoff:**       **Layoff Exemption Reason:**

Assigned Seniority Dates				
Seniority Date	Control Value	Labor Seniority Date	Override	Override Reason

[Recalculate Seniority Dates](#)

[Job Data](#)      [Employment Data](#)      [Earnings Distribution](#)      [Benefits Program Participation](#)

[Save](#)      [Return to Search](#)      [Notify](#)      [Previous tab](#)      [Next tab](#)      [Refresh](#)      [Update/Display](#)      [Include History](#)

[Work Location](#) | [Job Information](#) | [Job Labor](#) | **[Payroll](#)** | [Salary Plan](#) | [Compensation](#)

Step	Action
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16.	<b>Union Code:</b> Defaults from Position Data. Review for accuracy
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	<b>Union Seniority Date:</b> Review and correct per collective bargaining unit agreement
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Click the **Payroll** tab.



# Process Document HRMS: Promotion

The screenshot shows the 'Payroll Information' screen for employee Testa Casey. The employee ID is 0099999 and the record number is 0. The effective date is 09/07/2008, and the effective sequence is 0. The job indicator is 'Primary Job'. The action/reason is 'Pay Rt Chg' with a sub-reason of 'Promotion'. The payroll system is 'Payroll for North America'. The pay group is 'BWK' (Biweekly), employee type is 'H' (Hourly), tax location code is 'UMS05TX' (UM), and FICA status is 'Subject'. The combination code is empty. There are navigation buttons at the bottom: Save, Return to Search, Notify, Previous tab, Next tab, Refresh, Update/Display, and Include History. The browser address bar shows the URL: Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation.

Step	Action
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17.	<b>Pay Group:</b> Edit if necessary if there is a change due to the promotion.
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Click the **Salary Plan** tab.

# Process Document

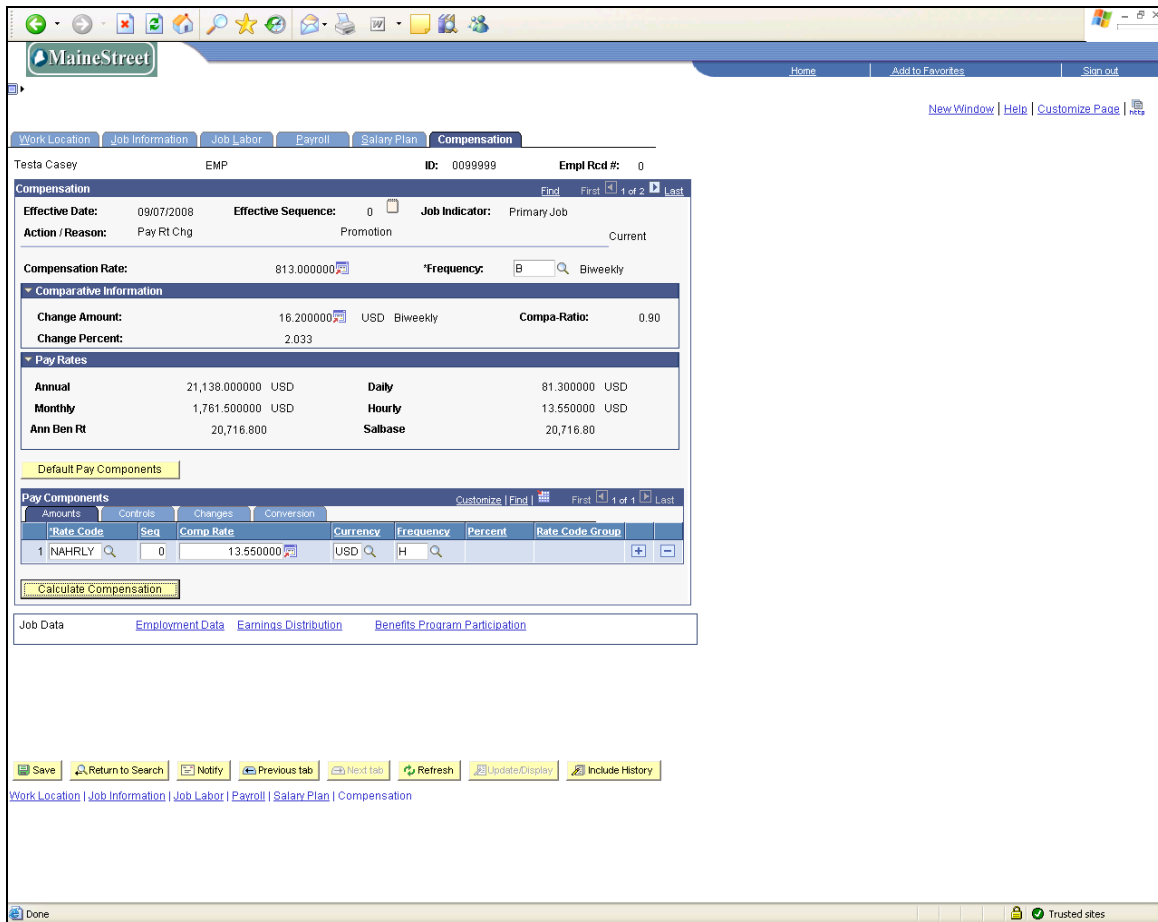
## HRMS: Promotion



The screenshot shows a web browser window displaying the HRMS interface. The browser's address bar shows the URL 'MaineStreet'. The page has a navigation menu with tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. The 'Salary Plan' tab is active, showing details for 'Testa Casey' with ID '0099999' and 'Empl Rcd #' '0'. The 'Salary Plan' section includes fields for 'Effective Date' (09/07/2008), 'Effective Sequence' (0), 'Job Indicator' (Primary Job), 'Action / Reason' (Pay Rt Chg), 'Promotion', and 'Current'. Below these are fields for 'Salary Administration' (D), 'Grade' (19), 'Grade Entry Date' (07/05/2003), 'Plan', 'Includes Wage Progression Rule', 'Step' (5), and 'Step Entry Date' (09/07/2008). At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Notify', 'Previous tab', 'Next tab', 'Refresh', 'Update/Display', and 'Include History'. The browser's status bar at the bottom indicates 'Trusted sites'.

Step	Action
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- |     |                                                                                         |
|-----|-----------------------------------------------------------------------------------------|
| 18. | If applicable, Enter appropriate step into the <b>Step</b> field.                       |
| 19. | Enter the <b>Effective Date</b> of the step change in the <b>Step Entry Date</b> field. |
| 20. | Click the <b>Compensation</b> tab.                                                      |



Testa Casey EMP ID: 0099999 Empl Rcd #: 0

Effective Date: 09/07/2008 Effective Sequence: 0 Job Indicator: Primary Job

Action / Reason: Pay Rt Chg Promotion Current

Compensation Rate: 813.000000 \*Frequency: Biweekly

Change Amount: 16.200000 USD Biweekly Compa-Ratio: 0.90

Change Percent: 2.033

Pay Rates			
Annual	21,138.000000 USD	Daily	81.300000 USD
Monthly	1,761.500000 USD	Hourly	13.550000 USD
Ann Ben Rt	20,716.800	Salbase	20,716.80

Default Pay Components

Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	Rate Code Group
1 NAHRLY	0	13.550000 USD	USD	H		

Calculate Compensation

Save Return to Search Notify Previous tab Next tab Refresh Update/Display Include History

### Step Action

21. If **Step** was entered on **Salary Plan panel**, click the **Default Pay Components** button to populate the **Comp Rate** field with the appropriate rate from the Wage Schedule. Otherwise, enter the **Comp Rate**.
22. Click the **Calculate Compensation** button to re-calculate the dollar amounts in the 'Pay Rates' section of this panel.
 

Calculate Compensation
23. Click the **Save** button.
 

Save