

HR Operations Work Instruction – Peer Checking Reclassification Process



THE UNIVERSITY
of ADELAIDE

Process Overview

Responsibility: HR Operations
Troubleshooting: HR Operations Team

Procedure

Obtain Reclassification email out of Cherwell

- Open **Cherwell**.
- Open the Cherwell Service Request that has been allocated to you for peer checking.
- In S:\Services_Resources\Human_Resources\EMPLOYEE SERVICES\2 - Employment Contracts\Appointment Offers\12 - Reclassification, check that a staff folder has been created in the relevant Year and Month folder for the secondment.
- Open up the **Notification of Outcome Letter** for cross-checking in Peoplesoft.

Check Peoplesoft for Reclassification Details of the Position

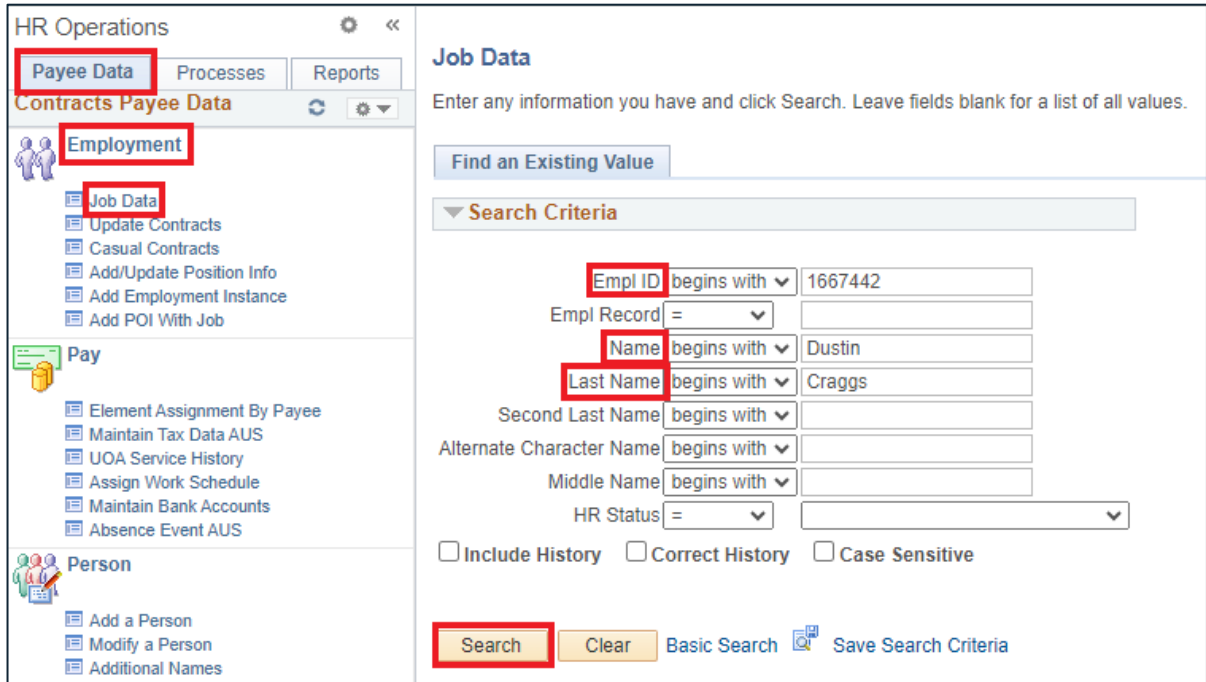
- Open **Peoplesoft** and the **HR Operations** tile.
- In the **Payee** tab, in the **Employment** section, click on **Add/Update Position Info**.
- This will open the **Add/Update Position Info** window.
- In the **Find an Existing Value** tab, enter the **Position Number** from the **Notification of Outcome Letter** in Cherwell.
- Click **Search**.

The screenshot shows the 'Add/Update Position Info' window in the HR Operations system. The left-hand navigation pane has 'Payee Data' selected, and under the 'Employment' section, 'Add/Update Position Info' is highlighted. The main window title is 'Add/Update Position Info'. Below the title, there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' (selected) and 'Add a New Value'. Below these is a 'Search Criteria' section with several input fields: 'Position Number' (beginning with '00023183'), 'Description' (beginning with), 'Position Status' (equals), 'Business Unit' (beginning with), 'Department' (beginning with), 'Job Code' (beginning with), and 'Reports To Position Number' (beginning with). There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. At the bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

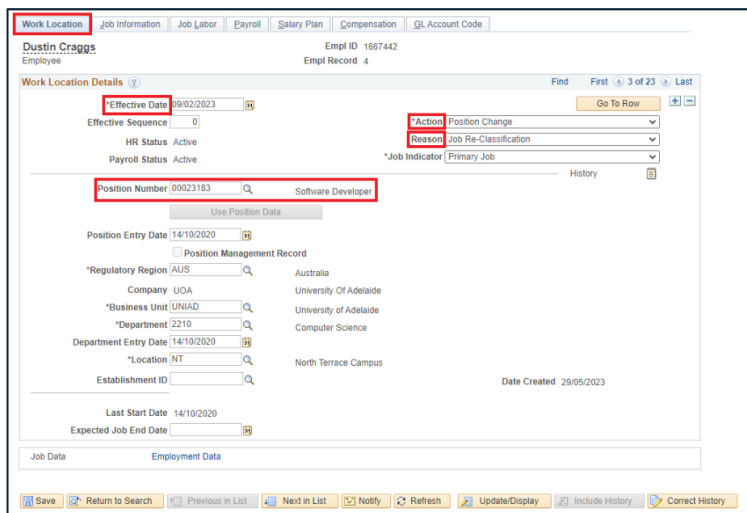
- The **Position Information** window opens. The information entered now needs to be checked for accuracy.
- In the **Description** tab, check the following to ensure that the correct information has been entered:
 - **Effective Date** = as per the Notification of Outcome letter. If any future rows, check to see that they have also been updated.
 - **Reason** = Job Re-Classification (JRC)
 - **Job Code** = as per the Notification of Outcome letter
 - **Title** = as per the Notification of Outcome letter
 - **Short Title** and **Detailed Position Description link** = as per the Notification of Outcome letter
 - **Reports To, Standard Hours, Reg/Temp, Full/Part Time** = check as appropriate

Check Peoplesoft for Reclassification Details of the Incumbent

- Open **Peoplesoft** and the **HR Operations** tile.
- In the **Payee Data** tab, in the **Employment** section, Click on **Job Data**.
- This will open the **Job Data** window.
- In the **Find an Existing Value** tab, enter the **Staff ID** from the **Position Classification Review Application Form** or enter the **Name** and **Last Name** as per the **Notification of Outcome Letter**.
- Click **Search**



- In the **Work Location** tab, check the following to ensure that the correct information has been entered:
 - **Effective Date** = as per the Notification of Outcome letter
 - **Action** = Position Change
 - **Reason** = Job Re-Classification
 - **Position Number** = check that the Position Description has been changed (if required)



- In the **Job Information** tab, check the following to ensure that the correct information has been entered and is reflective of the new classification:

Date	Action	Person	Role
15 June 2023	Document Creation	Rebecca Hill Sarah Goss and Emily Beerworth	HR Business Process Project Officer Senior HR Officers
28 June 2023	Document Approval	Helena Harris	Team Leader, HR Operations and Employment

- **Job Code** = as per the Notification of Outcome Letter
- **Job Classification** = as per the Notification of Outcome Letter

- In the **Job Labour** tab, check that the **Superannuation Plan** is the same as the previous row.
- In the **Salary Plan** tab, check the following to ensure that the correct information has been entered:
 - **Grade** = reflective of new classification
 - **Step** = as per the Notification of Outcome Letter
 - **Grade Entry Date** and **Step Entry Date** = as per the Notification of Outcome Letter

- In the **Compensation** tab, click on **Default Pay Components** and **Calculate Compensation** to calculate the new salary rate. Ensure that the Default Pay Components and Calculate Compensation buttons are also clicked in **any future rows**.

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- In the **Work Location** tab, click on the notepad icon to check that a note has been added regarding the reclassification.
- Make sure that the new classification details have flowed through to any **future rows** (ie. flexible working arrangements, suspension row etc).

Check updated Position Description (PD) in PageUp

- Open the **HR Operations** account in **PageUp** and navigate to **Access Position Description Library**

- Take the **Position Number** from the PD or from the Notification of Outcome Letter and enter it into the Position Number field and click **Search**

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- Click the **View** link of the most recently modified record. The **Approval Status** should be **Approved**. If showing as Pending, contact the [HR Advisor](#) and advise that there is a PD that is pending approval.

Position Title	Position Number	Employee Name	Manager Name	Date modified	Approval status	
Assistant Software Developer	00023183	Dustin Craggs	Claudia Szabo	7 Oct 2020	Approved	Edit View Recruit for position Archive
Software Developer	00023183	Dustin Craggs	Claudia Szabo	29 May 2023	Approved	Edit View Recruit for position Archive

- The **Position Description** information opens. In the **Position Info** tab, review the details to ensure that the correct information has been entered.
- In the **Documents** tab, check to see that the new PD has been uploaded

Review documents in Content Manager

- Open **Content Manager**
- Search for the Staff Members file as follows:
 - Search for = Records
 - Search by = Title Word
 - Matching Criteria = Staff ID Number
 - Click on the magnifying glass
- Locate the Staff Members file (HUMAN RESOURCES – Appointment – Staff ID – Staff Name)
- Check that all related documents have been uploaded to the Staff File

Close off Cherwell Request

- Open the **Cherwell Request**, click on the **Peer Checking – REQUIRED** tab and click on the **Complete Review** button.
- Resolve the Cherwell request and advise the HR Advisor that the reclassification has been processed.

This ends the Peer Checking of a Reclassification process.

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