HR Operations Work Instruction – Peer Checking Reclassification Process



Process Overview

Responsibility:HR OperationsTroubleshooting: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.

| HR Operations • « | |
|--|---|
| Payee Data Processes Reports | Add/Update Position Info |
| Contracts Payee Data 🛛 😋 💌 | Enter any information you have and click Search. Leave fields blank for a list of all values. |
| ရှိလို Employment | Find an Existing Value Add a New Value |
| Job Data Update Contracts | Search Criteria |
| Casual Contracts Add/Update Position Info | Position Number begins with V 00023183 |
| Add Employment Instance Add POI With Job | Description begins with 🗸 |
| Pay | Position Status = 🗸 |
| - 0 1 | Business Unit begins with 🗸 |
| Element Assignment By Payee | Department begins with 🗸 |
| E Maintain Tax Data AUS | Job Code begins with 🗸 |
| Assign Work Schedule | Reports To Position Number begins with V |
| Maintain Bank Accounts Absence Event AUS | Include History Correct History Case Sensitive |
| Person | |
| E Add a Person | Search Clear Basic Search 🖾 Save Search Criteria |
| Modify a Person | |

- 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

| HR Operations • « | |
|---|--|
| Payee Data Processes Reports | Job Data |
| Contracts Payee Data 😋 🙍 👻 | Enter any information you have and click Search. Leave fields blank for a list of all values. |
| A Employment | Find an Existing Value |
| I Job Data I Update Contracts | Search Criteria |
| Casual Contracts Add/Update Position Info Add Employment Instance Add POI With Job | Empl ID begins with I667442 Empl Record = |
| Pay | Name begins with ✔ Dustin Last Name begins with ✔ Craggs |
| Element Assignment By Payee Maintain Tax Data AUS UOA Service History Assign Work Schedule Maintain Bank Accounts Absence Event AUS | Second Last Name begins with Alternate Character Name begins with Middle Name begins with HR Status = |
| E Add a Person | Include History Correct History Case Sensitive |
| Additional Names | Search Ciear Basic Search 🔤 Save Search Citteria |

- 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)

| mployee | | | Empl Record 4 | 442 | | | |
|-------------------------|--------------|--------------|------------------------|----------------|-----------------------|--------------|--------------|
| Work Location Details 👔 | | | | | FI | nd First 🕢 3 | of 23 🛞 Last |
| *Effective Date | 09/02/2023 | B | | | | Go To Roy | H = |
| Effective Sequence | 0 | | | *Action | Position Change | | ~ |
| HR Status | Active | | | Reason | Job Re-Classification | | ~ |
| Payroll Status | Active | | | *Job Indicator | Primary Job | | ~ |
| De altiere Muserkan | 000000400 | | | | | History | |
| Position Number | 00023163 | _4 | Software Developer | | | | |
| | Use P | osition Data | | | | | |
| Position Entry Date | 14/10/2020 | 23 | | | | | |
| | Position Mar | nagement Re | cord | | | | |
| *Regulatory Region | AUS | Q | Australia | | | | |
| Company | UOA | | University Of Adelaide | | | | |
| *Business Unit | UNIAD | Q | University of Adelaide | | | | |
| *Department | 2210 | Q | Computer Science | | | | |
| Department Entry Date | 14/10/2020 | 31 | | | | | |
| *Location | NT | Q | North Terrace Campus | i i | | | |
| Establishment ID | | Q | | | Date Created | 29/05/2023 | |
| | | | | | | | |
| Last Start Date | 14/10/2020 | - | | | | | |
| Expected Job End Date | | 91 | | | | | |
| Job Data Emr | lovment Data | | | | | | |

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

Page 2|5

| 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 |

| Work Location Job Information | Job Labor Payroll Sala | ry Plan Compensation | GL Account Code | | |
|-------------------------------|------------------------|--------------------------|------------------------------|--------|---------------------|
| Dustin Craggs | | Empl ID 1667442 | | | |
| mployee | | Empl Record 4 | | | |
| Job Information Details 👔 | | | | Find | First 🕢 3 of 23 🕑 I |
| Effective Date 0 | 9/02/2023 | | | | Go To Row |
| Effective Sequence 0 |) | | Action Position Change | | |
| HR Status A | Active | | Reason Job Re-Classification | | |
| Payroll Status A | Active | Jol | b Indicator Primary Job | | History 🗐 |
| | | | | | History 🖾 |
| *Job Code 3 | 3080 Q | Higher Education Officer | Lvl 6 | | |
| Entry Date | 09/02/2023 | | | | |
| Supervisor Level | Q. | | | | |
| Supervisor ID | Q | | | | |
| Reports To | 00016474 | Associate Prof/Reader 1 | 611685 Claudia Szabo | | |
| "Regular/Temporary | Fixed Term Contract | *Full/Part | Part-Time V | | |
| Empl Class | Prof Staff 🗸 🗸 | *Officer Code | None v | | |
| *Regular Shift | Not Applicable 🗸 | Shift Rate | | | |
| Standard Hours | | Shift Factor | | | |
| Standard Hours | 29.40 | Work Period | W Q Weekk | | |
| FTE | 0.800000 | As of Date | 09/02/2023 | | |
| Combined Standard | 1 Hours 29.40 | FTE 0.800000 | | | |
| Contract Number (?) | | | | | |
| Contract Number | 0016 Q | Spec Task | Next Contract Number | | |
| Contract Type | STP | | Generate Contract | | |
| Australia | | | | | |
| Salary Packaging | | | | | |
| | Salary Packaged | Рауг | roll Tax State SA | QSouth | n Australia |
| Higher Education | | | | | |
| Work Sector | Higher Education | v | Job Function Other function | | ~ |
| Annual Contact Hours | | Type of Wo | rk Performed | | ~ |
| Type of Appointment | Limited | ✓ Appointm | nent Duration 9 | | |
| Teaching Weeks | | Job (| Classification 206 | Q | e |

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

| Work Location Job Information | Job Labor Payroll Salary Plan Compensation GL Account Code | |
|------------------------------------|--|-----------------------------|
| Dustin Craggs Employee | Empl ID 1667442 Empl Record 4 | |
| Salary Plan Details 👔 | | Find First 🕢 3 of 23 🕟 Last |
| Effective Date | 09/02/2023 | Go To Row |
| Effective Sequence | 0 Action Position Change | |
| HR Status | Active Reason Job Re-Classification | |
| Payroll Status | Active Job Indicator Primary Job | (111) |
| Salary Admin Plar Grade Ster | HEO Q V Higher Education Officers 060 Q V HEO Level 6 Grade Entry Date 09/02/2023 3 1 Q Step Entry Date 09/02/2023 3 Includes Wage Progression Rule | History |

• 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.**

| 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 |

Page 3|5

| Work Location Job Infor | mation Jo | b Labor Payroll | Salary Plan | Compensation | GL Account (| Code | | | | |
|---|--|-----------------|-------------|-----------------|--------------|---------------------|----------|----------------|--------|---|
| Dustin Craggs Empl ID 1667442 Employee Empl Record 4 | | | | | | | | | | |
| Compensation Details (| Compensation Details (2) Find First 🚯 3 of 23 🕟 Last | | | | | | | | | |
| Effective Date 09/02/2023 Go To Row | | | | | | | | | | |
| Effective Se | quence 0 | | | | Action P | osition Change | | | | |
| HR | Status Activ | /e | | | Reason Jo | b Re-Classification | on | | | |
| Payrol | Status Activ | /e | | Job | Indicator P | rimary Job | | | 611b | |
| | | | | | | | | History | | |
| Compensat | ion Rate | 66.303.20 | AUD Q | | | *Frequency | A Q Annu | ial | | |
| Comparative Inform | nation 👔 | | | | | | | | | |
| Change | Amount | 8,201.599224 | 👳 AUD | Annual | | | | | | |
| Change | Percent | 14. | 116 | Compa-Ratio 0.9 | 6 | | | | | |
| Pay Rates ? | | | | | | | | | | |
| Default Pay Compo | onents | | | | | | | | | |
| Pay Components (?) | | - | | | Persor | nalize Find 🗇 | l 🔣 Fi | rst 🕢 1 of 1 🥡 |) Last | |
| Amounts Controls | C <u>h</u> anges | Conversion | | | | | | | | |
| *Rate Code | Seq | Comp Rate | | Currency | Frequenc | у | Percent | | | |
| 1 CABASE | 0 | | 43.369440 👳 | AUD | Q H | Q | | | + - | 9 |
| Calculate Compensi | sation | | | | | | | | | |

- 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

| Search Talent search | | | Jobs People | Reports 🗸 Recent iter | ns 🗸 Oulck search 🔍 🗷 | 8 * |
|--------------------------------|------------------------------|----------------|--------------|-----------------------|----------------------------------|---------------|
| | | | | | | - • |
| New task | | | | | O Delmanus tearms 8 useus | |
| Dashboard | | | | <u></u> | o Primary teams & users | |
| :RM Dashboard | | | | | Manager Activities | ^ |
| | Total All Notific | ations Testing | | | 10 Offers awaiting your approval | |
| lew job | | | | | | |
| ly panel jobs | 0 test_job_306281 | | | | O Table | |
| lanage jobs | Requisition No.: | | Positions: 0 | Vacancies: 0 | I Tasks | ~ |
| ly jobs | O 1 new applications. View → | | | | The similar sector and | |
| ly sourced jobs | | | | | a Activities performed | |
| ly job approvals | | | | | English Do | owned by Ran |
| lanage job templates | | | | | angles () o | increa by rug |
| Manage forms | | | | | | |
| Access Position Description Li | | | | | | |

• 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**

| 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 |

Page 4|5

| ∃ Page∪p. | | | | Jobs People Rep | ports 🗸 Recent items 🗸 | Quick search Q | HR 🗸 ? 🖌 |
|--------------------------|-----------------|---------------|------------------|-----------------|------------------------|----------------|-----------|
| New Position Description | | | | | | | |
| Position description | | | | | | | |
| Position Title | Position Number | Employee Name | Faculty/Division | School/Branch | Approval | status | |
| | 00023183 | | All | ✓ All | ✓ All | ~ | |
| Status Active | ~ | • | | | | Cle | ar Search |

 Click the View link of the most recently modified record. The Approval Status should be Approved. If showing as Pending, contact the <u>HR Advisor</u> and advise that there is a PD that is pending approval.

| Position description | | | | | | | |
|------------------------------|-----------------------------|---------------|------------------|---------------|----------------------|---------------------|-----------------------------------|
| Position Title | Position Number 00023183 | Employee Name | Faculty/D All | ivision 🗸 | School/Branch All | Approval status All | ~ |
| Status Active | | | | | | | Clear Search |
| 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
 - o 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.

Page 5|5

| 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 |