THE UNIVERSITY OF MEMPHIS®

WorkforUM Training

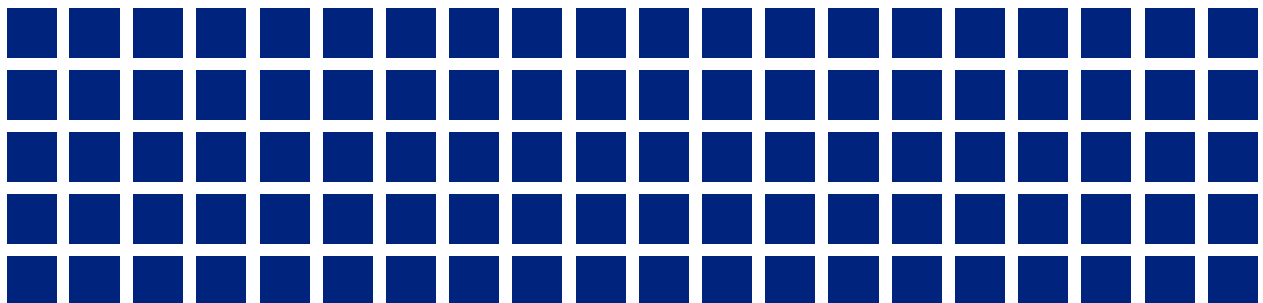## Part 4: Requests to Reclassify/Retitle an Existing Position

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Types of Requests

Occasionally an existing position within WorkforUM needs to have changes made to it. Minor changes in job duties, etc. can be completed directly on a Request to Fill action. That being the case, the reclassification action is now more often to be used when a position needs major changes such that a position is being entirely restructured or retitled. It is also important to keep in mind that a department conducts a reclassification on a *position*, not on an *individual*.

There are two types of reclassifications in WorkforUM. These are related to staff/administrative executive/contract coach positions and full-time faculty/academic executive positions. The latter group of positions are referred to in the system as retitles, not reclassifications.

Staff/administrative executive/contract coach positions are fielded by Human Resources and the appropriate budget authority (as appropriate).

Full-time faculty/academic executive retitles are handled by Faculty Administrative Services. (Reclassification for athletic contract positions are handled on a case-by-case basis via HR.)

Reclassification/Retitle Routing

The type of position for which a reclassification/retitle request is being completed will determine the workflow it will follow in getting approved. Workflows typically involve going from the departmental level through the approving, executive, and HR/Faculty Administrative Services authorities, as appropriate.

<u>Staff/administrative executive/contract coach reclassifications</u> typically begin with either an Assistant or a Departmental Authority making the initial request, though any step in the workflow may begin one. If an Assistant (generally a secretary) begins the request, it can then only be submitted to that Assistant's Departmental Authority (the department head or his/her proxy). Whether the Departmental Authority begins the request or merely reviews/approves the request submitted by the Assistant, the record will then be submitted to the next appropriate level. Ultimately, approval (or non-approval) of the reclassification rests with Human Resources, though any level prior to HR Compensation on the workflow could technically cancel the request.

PLEASE NOTE: In many cases, most often with non-academic departments, the Departmental Authority and Approving Authority may be composed of the same individuals. Where academic departments generally have three levels of approval (chair to dean to provost), most non-academic areas have just two (director to vice president). In such cases, the Departmental Authority may end up submitting records to themselves. This can be avoided when requests are begun at the Approving Authority level, when possible. The Change User Type dropdown box in the upper-right corner of WorkforUM can be used to toggle between user roles in the system.

**Reclassify Hourly/Monthly/Administrative Executive Position Workflow**
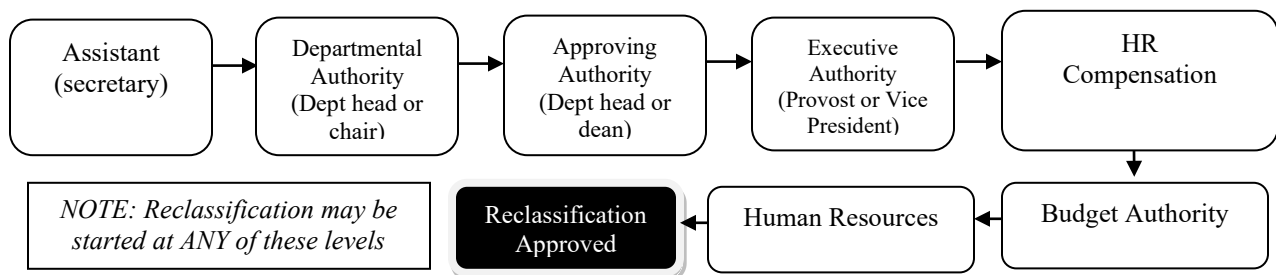
Faculty retitle requests also typically begin with either an Assistant or a Departmental Authority making the initial request, though any step in the workflow may begin one. However, the request is ultimately routed differently than an hourly/monthly request.

If an Assistant (generally a secretary) begins the request, it can then only be submitted to that Assistant's Departmental Authority (the departmental chair or his/her proxy). Whether the Departmental Authority begins the request or merely reviews/approves the request submitted by the Assistant, the record will then be submitted to the Approving Authority. The Approving Authority for faculty positions is always the Dean or his/her proxy. If approved, the Dean will submit the request to the Executive Authority (always the Provost or his/her proxy for faculty positions). If approved by the Executive Authority, the request will be forwarded to Faculty Administrative Services, who will finalize approval of the retitle and forward to Institutional Equity should posting be requested.

Keep in mind that faculty retitles are typically completed after a faculty hire is made, when the ultimate decision on the hired applicant's rank has been determined. For example, a Professor position is vacated when an employee retires. The department then posts the job at an associate/assistant rank. When the selectee is hired, it is determined that he/she will serve at the assistant rank. In this case, a retitle action needs to occur on the original Professor position to have it retitled as an Assistant Professor.

Retitle Full-Time Faculty/Academic Executive Position Workflow
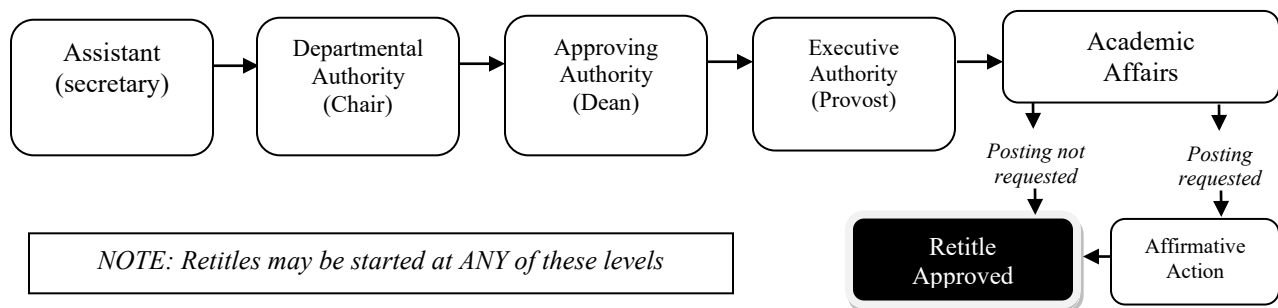
Completing a Reclassification/Retitle Request

To begin completing a Reclassification request, you may wish to begin by verifying that you are logged in under the appropriate user type. If you need to change user type, use the dropdown box in the upper-right corner of the screen to select the appropriate role.

To start your Reclassification Request, go to the Position Management module by selecting Positions from the three dots in the upper-left corner of the screen. Once there, select the appropriate type of position from the Positions menu in the upper-middle of the screen. A list of your available positions will display. Find your position, and click its title. In the upper-right corner of the position description, click **Reclassify/Modify Position** or **Retitle Request** (whichever is appropriate for your position). You will be advised that beginning this action will lock this position to any other actions being taken on it. Click **Start** to begin the action.

Clicking the **Start Action** link will take you to a search menu. You will be able to search for the existing position by **Job Title**, **Working Title**, **Position Number**, **Category**, **Incumbent Employee ID Number**, and **Incumbent Employee First and Last Names**. Of these, **Position Number** is generally the one most often used. If you do not know the position number, it is recommended that you only use the **Category** drop-down box, select the corresponding type of position (hourly/monthly, faculty, or executive/special class), and search for all positions of that type within the organizations to which you have access. Enter your search criteria and click **Search**.

You are now taken to a screen with a series of tabs running down the left side of the screen. These tabs make up the actual Reclassification request. You will need to proceed through each of these tabs in order to complete your initial request. Each of these tabs and its requirements will be discussed in this training individually.

Department Tab

On this tab, you will need to indicate the hiring department, as well as provide a brief summary of what type of change your reclassification is covering. You will also provide an advertised title for the reclassified position, **even if you are not requesting a posting at this time**. Also, provide an effective date for the reclassification you are requesting. When finished, click the orange **Next** button to continue.

Major Duties and Responsibilities Tab

On this tab, make the necessary modifications to the position's duties and responsibilities, ensuring that the final total equals 100%. These entries may be changed in minor ways or major ways, depending upon your goals with this reclassification. You may add new duties to those already populated by clicking the Add Duties and Responsibilities Entry button near the bottom of the screen. You may also remove a duty by clicking the appropriate **Remove Entry** checkbox. Keep in mind that Human Resources will be reviewing your entries and conducting a compensation analysis based on the title and duties you have entered. When this tab is complete, click the orange **Next** button.

Additional Position Description Information Tab

On this tab, you are to enter examples of this position's typical use of judgment and/or resourcefulness. Information/examples should be regular and on-going and related to the duties listed on the **Major Duties and Responsibilities** tab. Also, if there is other pertinent information, please list it in the **Other Information** text area. When this tab is complete, click the orange **Next** button.

Position Tab

This tab contains much of the key information related how your position's information would appear on a job posting. You may be asked to complete this information even if you are not posting this job along with reclassifying it.

The Salary (Internal View) field allows you to communicate any budgetary limitations or scenarios to the other approvers of this action. This field is NOT viewable to the applicant.

The Campus Location field allows you to indicate at which University location this position is primarily located. This should help applicants find positions of geographical interest to them.

The Work Schedule field appears for Hourly/Monthly/Administrative Executive positions and should be completed even if the position works a standard Monday-Friday 8am-4:30pm schedule. If your position works an atypical schedule or requires overtime during peak periods, you would indicate that in this field.

The Minimum Classification Qualifications field is automatically populated based on your position's PCLS code. This is a statement of the minimum education and experience for all positions within your position's PCLS designation and is not changeable. However, you will state in the Minimum Position Qualifications field what the minimum education and experience qualifications are to be for your specific position. You can keep the default values from the classification, or you may raise them slightly should your position have additional requirements that you can defend if questioned. Keep in mind that your minimum position qualifications may not be LESS than the minimum classification qualifications, nor can they surpass them greatly. Only the Minimum Position Qualifications field is displayed to the applicant. In order to use a given item as a disqualifying factor, that item should be listed in this section.

The Special Conditions field remains in place should there be unusual circumstances related to your position of which you would like to alert applicants. For example, a grant-funded may have a future funding statement in this field. Keep in mind that unusual schedules and campus

locations now have their own fields, so this information would not need to go under Special Conditions any longer.

The Working Conditions field is pre-populated based on the PCLS code, but if your position has additional working conditions beyond these defaults, you may list them in the Additional Working Conditions field. Both of these fields display to the applicant.

If the position you are requesting to fill will be supervising other positions, please include a basic statement to that effect in the Positions Supervised field.

 Next, you will see a field that asks for the contact information for an individual within the department whom other authorities in the workflow could contact with additional questions should the need arise. This contact information is not viewable by applicants.

The last field is the Hiring Range field, and this salary field WILL display to applicants. The values that initially appear will show a minimum and midpoint salary for this position's PCLS code, which should depict a very wide range. You may either keep this range in place, or change it to say something general like "Open," "Commensurate with education and experience," "Competitive." Keep in mind your statements in this field WILL be viewable to the applicant, and your entries will be reviewed prior to being posted.

When this tab is complete, click the orange **Next** button.

Supervisor Tab

If your reclassification is causing this position to now report to a different supervisor, indicate that change in supervisory position by selecting it on this tab. If the supervisory relationship is not changing from the default position indicated, you may move on to the next tab. When this tab is complete, click the orange **Next** button.

Supplemental Documentation Tab

The next tab on a Reclassification request is used for **Supplemental Documentation**. In this section, users can upload pertinent documents from their computers in order to be reviewed by other authorities within a given workflow. This tab is the most important tab on a reclassification request. You should upload all necessary budget revisions, organizational charts, and other documents on this tab via each line item's **Actions** menu. When this tab is complete, click the orange **Next** button.

Requisition Form Tab

The **Requisition Form** tab is related to advertising a position. If your reclassification request does not require posting, then this tab may be skipped. If it does require posting, then please complete the date fields, etc. on this tab. When this tab is complete, click the orange **Next** button.

Supplemental Questions Tab

This tab should only be completed on a reclassification request if posting is also being requested at the same time. Directions for this tab are available in the Request to Fill training guide. When this tab is complete, click the orange **Next** button.

Applicant Documents Tab

This tab should only be completed on a reclassification request if posting is also being requested at the same time. Directions for this tab are available in the Request to Fill training guide. When this tab is complete, click the orange **Next** button.

Training - Department & Training – HR Tabs

These tabs highlight training courses offered on campus that either the hiring department or Human Resources has indicated as being requirements for a given position.

You have now completed your Reclassification request, and now it can be saved for further revision at a later time, or routed to the next appropriate level. Make your selection from the orange **Take Action on Action** presented, leave comments and add to your Watch List as desired, then **Submit**. If you send this action to the next level in the workflow, the members of that level will receive an e-mail notification that they have a pending action in their In Box for their attention within WorkforUM.

Additional Training

This concludes the training session on Requests to Fill. Further WorkforUM training is available for the following topics.

- Introduction to the System

- Requesting to Fill Existing Positions

- Requesting to Create a New Position

- Tracking, Reviewing, and Processing Applicant Pools

- Hiring an Applicant and Completing a Hiring Proposal

- Changing a Position's Supervisor

- Part-Time Faculty