State of Wisconsin

Department of Administration

Reclassification and Reallocation

Purpose

- The scope of the chapter only covers those processes directly related to reclassification or re allocation within PeopleSoft HCM.
- Fields, icons, and buttons not addressed are either not being used by the State or are not applicable to the topic.

Contents

Resources

- [Chapter 370 - Classification Policies and Procedures for Reclasses and Reallocations](#)
- [Chapter 380 - Completion of Reclassification Request Form](#)
- [Reallocation Notice/Request (DOA-15321](#))
- [Reclassification Request (DOA-15314)](#)
- [Employee Notification Receipt Reclass Reallocation Form (DOA-15311)](#)

Processing Reclassifications or Reallocations Within PeopleSoft

IMPORTANT: DO NOT process a reclass if any of the following apply:

- If the reclass effective date is on or before 11/29/2015 (i.e., PeopleSoft conversion date). Note: PeopleSoft will auto-calculate back pay owed starting on 12/13/2015. Any back pay owed prior to 12/13/2015 will need to be paid out through a Pay One Time Transaction (POTT).

- If there are any position changes that have an effective date that is later than the effective date of the reclass (Reports To, FLSA, etc.).

- If there are any job data changes that have an effective date that is later than the effective date of the reclass (ICI Job Row, Pay Rate Changes, hiring transactions, etc.).

In PeopleSoft, when updating a filled position, such as in a reclass, you must enter an effective date that is later than the current position data row and the current job data row. Because reclass effective dates occur in the past, Agency HR staff must first review the effective dates of position and job data. Only enter a reclass if there are no position or job data effective dates that are later than the effective date of the reclass.

If there are position data or job data rows with an effective date after the effective date of the reclass, the agency **must submit a ticket** for reclass processing (please include the Reclass/Reallocation Form). If the reclass requires DPM Central HRIS processing, **do not** enter any data related to the reclass or reallocation in PeopleSoft.

1. Use the Position Request form to process the Reclassification or Reallocation of the position.

   Workforce Administrator Home Page > Human Resources Dashboard > Position Tile > Position Requests Folder > WI Position Request Home
   OR
   NavBar > State of Wisconsin (STAR) > Human Resources > Process > WI Position Requests > WI Position Request Home

2. Enter or look up the **Position Number** that requires updates.

3. Click **Update Existing Position**.

4. On the WI Position Request tab, enter or select the following:
   a. **Reason:** Enter or select JRC (Job Reclassification) or JRE (Job Reallocation) based on the transaction.
   b. **Effective Date:** The date the transaction is effective. Reclassifications and Reallocations can ONLY be effective on the Sunday of the beginning of a pay period.
   c. **Job Code:** Remove the old job code and tab out of the field. This will ensure all data associated with the old job code is removed. Enter or look up the new job code.
   d. **HR Comments** are required to identify and justify any changes.
   e. If necessary or desired, you can also change the following data within this request:
      - **Short Title:** typically, the Job Code.
      - **Title:** defaults to the Job Code Title. The Title can be a working title and will display on the Employment Data page of Job Data as the Business Title.
      - **Supervisor Level:** if this changed with the transaction it should be updated here.
      - **FLSA Status:** The FLSA status will default to the status associated with the job code. If you have approval from DPM Bureau of Classification and Compensation to have a different FLSA status on this position you can change it here.
   f. Click **Save**

5. If the request is good to go, click **Submit to Agency Budget**. If the transaction will not be occurring, click **Cancel Request**.

6. You can make changes to the request while it's in Draft Status and before it's submitted to Agency Budget. After it's been submitted to Agency Budget you cannot make changes.

7. Once all approvals have been completed the system will automatically add a Position Change row to the incumbent's Job Data (15 minutes after the final approval).

- The Job Data row created from the Position Change will be **effective** the date of the transaction.
- The **Action** will be Position Change.
- The **Reason** will be either Job Reclassification or Job Reallocation.
- The **Position Title** will be updated next to the position number,
- The **Position Management Record** box will be checked (this identifies that the row was created through Position Management vs. being added directly to job data).

8. If the employee will be r**egraded** with this transaction you will need to manually add an **effective sequenced** job data row for **Pay Rate Change/Regrade due to Reclass or Reallocation** to update the comp rate.

    a. Click the "+" to add a new job data row.
    b. Verify/update the effective date of the row.
    c. Increase the effective sequence by one (1) from the sequence of the previous row.
    d. Select Pay Rate Change for the Action.
    e. Select Regrade due to Reclass or Reallocation for the Reason.
    f. Go to the Compensation tab.
    g. Enter the new comp rate and click Calculate Compensation.

9. If the **FLSA status** changed with the transaction you will need to manually add an effective sequenced job data row for Data Change/Absence Eligibility Change to change the Absence Eligibility field on the Payroll tab.
   a. Click the "+" to add a new job data row.
   b. Verify/update the effective date of the row.
   c. Increase the effective sequence by one (1) from the sequence of the previous row.
   d. Select Data Change for the Action.
   e. Select Absence Eligibility Change for the Reason.
   f. Go to the Payroll tab.
   g. Enter the new Eligibility Group.

10. You may also need to update the **Workgroup** or other TRD data on the Time Reporter Data page of the Employment Information page when the FLSA status changes.

   a. Go to the Employment Data page.
   b. Click on the **Time Reporter Data** link to access Time Reporter Data.
   c. Click the "+" to add a new TRD row.
   d. Verify/update the effective date of the row.
   e. Update the Workgroup.
   f. Click **OK**.

You may also need to manually adjust **absence balances** when the FLSA status changes. See https://dpm.wi.gov/Documents/JobAids/HCM/PY/AbsenceAdjustmentsJobAid.pdf for specific instructions on this.

11. If the **Benefits Eligibility** changed with the transaction you will need to manually add an effective sequenced job data row for Data Change/Benefits Eligibility Change to change the Elig Fld value(s) on the Benefits Program Participation page.

   a. Click the "+" to add a new job data row.
   b. Verify/update the effective date of the row.
   c. Increase the effective sequence by one (1) from the sequence of the previous row.
   d. Select Data Change for the Action.
   e. Select Benefits Eligibility Config for the Reason.
   f. Go to the Benefits Program Participation page.
   g. Update the Elig Fld values as necessary.

12. After all Job Data has been updated click **Save** to complete the transaction(s).

If you realize later that any portion of the transaction was missed or not completed properly, please **submit a ticket** for DPM Central HRIS to make the corrections. Do not attempt to correct the data yourself or add additional position or job data rows to correct errors in the transaction.

Checklist

☐ Check Position Data and Job Data. Are there any effective dated rows with a date that is after the effective date of this transaction?
  - o **Yes – STOP**. Create a ticket for DPM Core HR to process the transaction. Include the reclass/reallocation request form and FLSA status change approval (if applicable).
  - o **No** – Continue to process the transaction using this job aid.

☐ Use the Position Change Request to update the position (instructions start on page 3).

☐ Wait 15 minutes after all approvals have been completed for the Position Change to publish to the incumbent's Job Data (page 4).

☐ Is the incumbent being regraded with this transaction?
  - o **Yes** – Add an effective sequenced job data row for Pay Rate Change/Regrade due to Reclass or Reallocation and update the Comp Rate (page 5).
  - o **No** – go to next step

☐ Did the FLSA status change with this transaction?
  - o **Yes**:
    - ▪ Add an effective sequenced job data row for Data Change/Absence Eligibility Change and update the Absence Eligibility field on the Payroll tab of Job Data (page 6).
    - ▪ Review and update the Workgroup on TRD (page 7).
    - ▪ Review and update Absence Balances (See https://dpm.wi.gov/Documents/JobAids/HCM/PY/AbsenceAdjustmentsJobAid.pdf)
  - o **No** – go to next step

☐ Did the Benefits Eligibility change with this transaction?
  - o **Yes** – Add an effective sequenced job data row for Data Change/Benefits Eligibility Change and update the appropriate Elig Fld value(s) on the Benefits Program Participation page of Job Data (page 8).
  - o **No** – go to the next step.

☐ Save Job Data to complete the transaction(s) (page 9).