Manage Transfers

Promotion

CloudVergent 360

Lesson Objective:

Upon completion of the Manage Transfers: Promotion lesson, you will be able to:

Objective
• Process an employee promotion by updating position, assignment, payroll, and salary details accurately.

The promotion process begins by selecting the employee, entering the promotion start date, and selecting the appropriate promotion reason. The new position is assigned to reflect the employee's upgraded role and responsibilities within the organization.

Position synchronization controls whether assignment values update automatically from the position or remain editable. When synchronization is turned on, fields are auto-populated and locked. When turned off, selected attributes can be manually updated as required.

Additional details such as probation period, payroll actions, salary components, and additional compensation are reviewed and updated. Supporting documents can be added before completing the transaction to ensure accurate promotion processing.

Focus

- This lesson focuses on processing an employee promotion by selecting the employee, applying the Promotion Start Date, and selecting the Promotion Reason and Position.
- The scope also includes handling position synchronization behavior during the assignment update. This ensures the promotion is applied correctly at the assignment level.
- The lesson also focuses on completing Additional Assignment Info, Payroll actions, and Salary updates related to the promotion.
- It includes updating salary components, viewing current and prior salary details, and adding additional compensation if required.

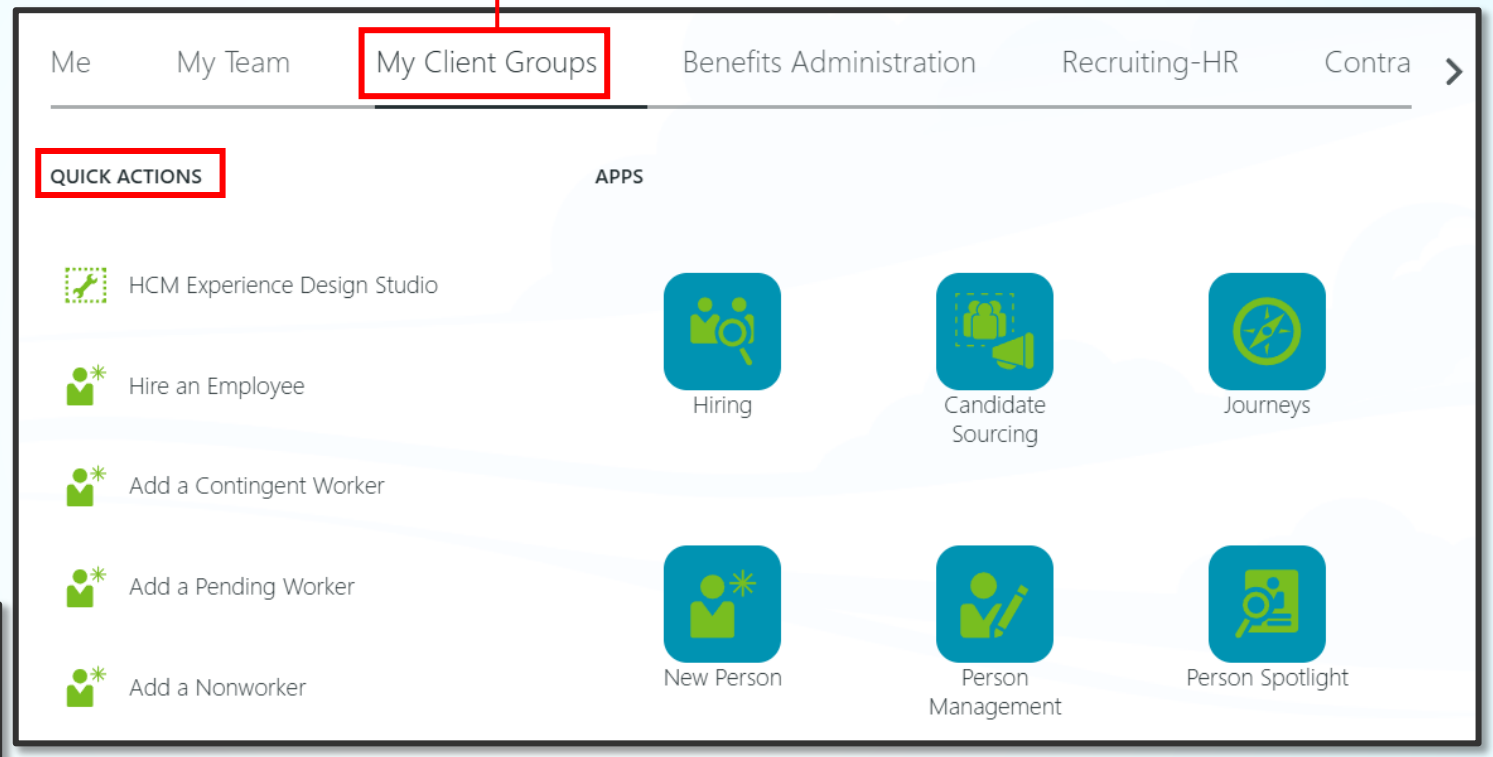
Navigation

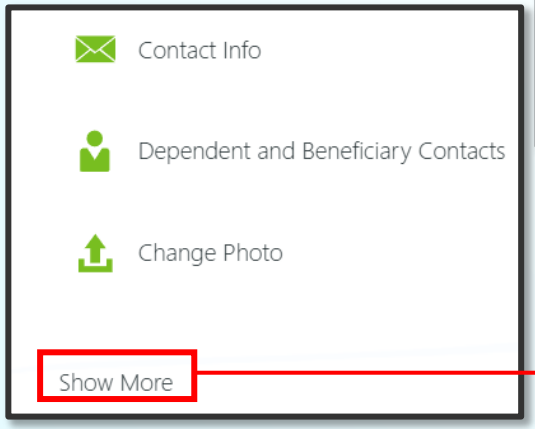
My Client Groups →
Quick Actions →
Show More →
Employment →
Promote

Manage Transfers: Promotion

1

Select the **My Client Groups** tab





2

From the **Quick Actions** section, select the **Show More** link from the drop-down list

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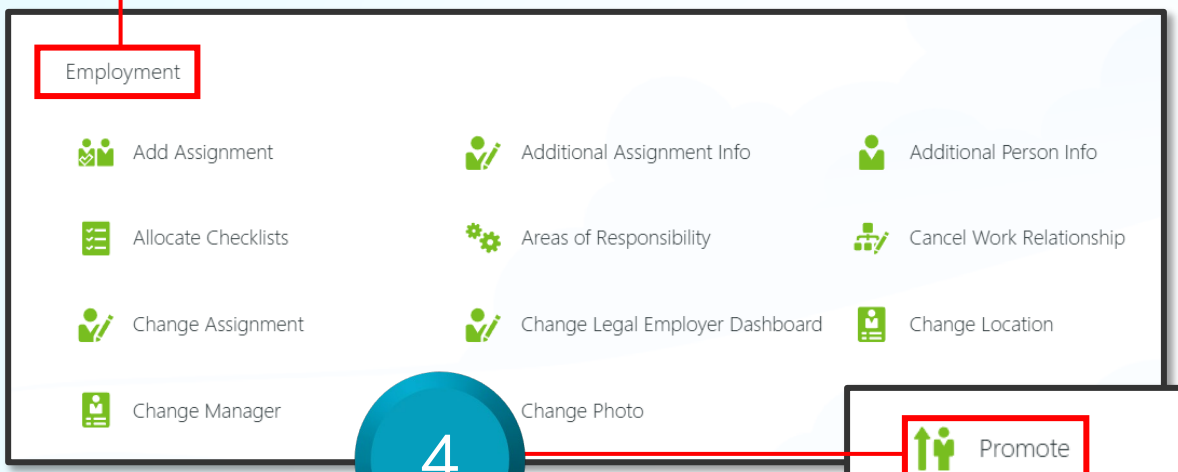
3 Locate the **Employment** section



4 Select **Promote** under the **Employment** section

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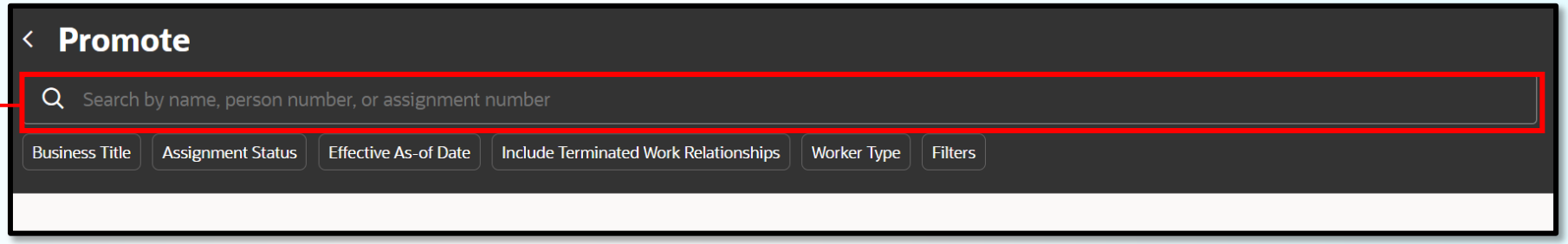
5

In the Search field, key in the employee's name, person number, or assignment number.



The Coordinator can select the employees directly from the **Promote** page instead of using the search

Apply filters under search bar to ease the search to find an employee

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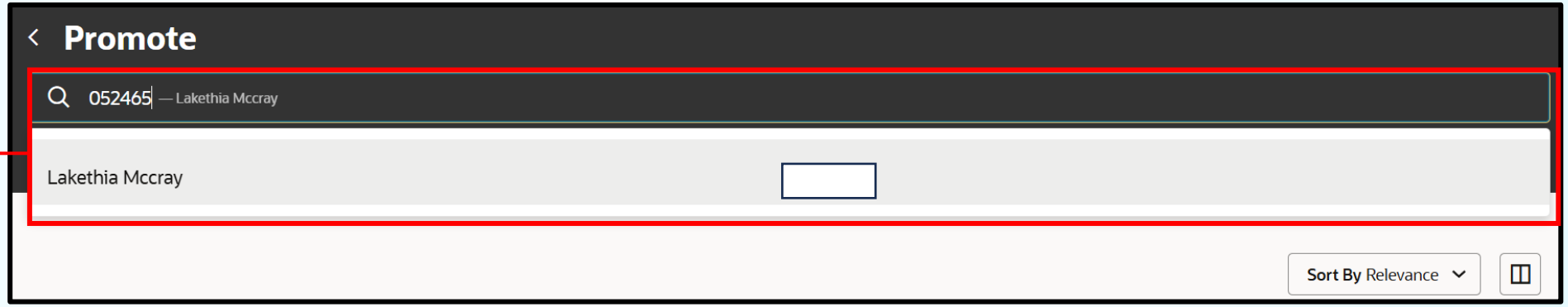
6

Select the **Employee** from the search result



Troubleshooting

If the expected employee does not display in the search list, double-check the spelling of the name, or confirm that the correct person number or assignment number is being used. The system will only return exact or close matches based on these identifiers.

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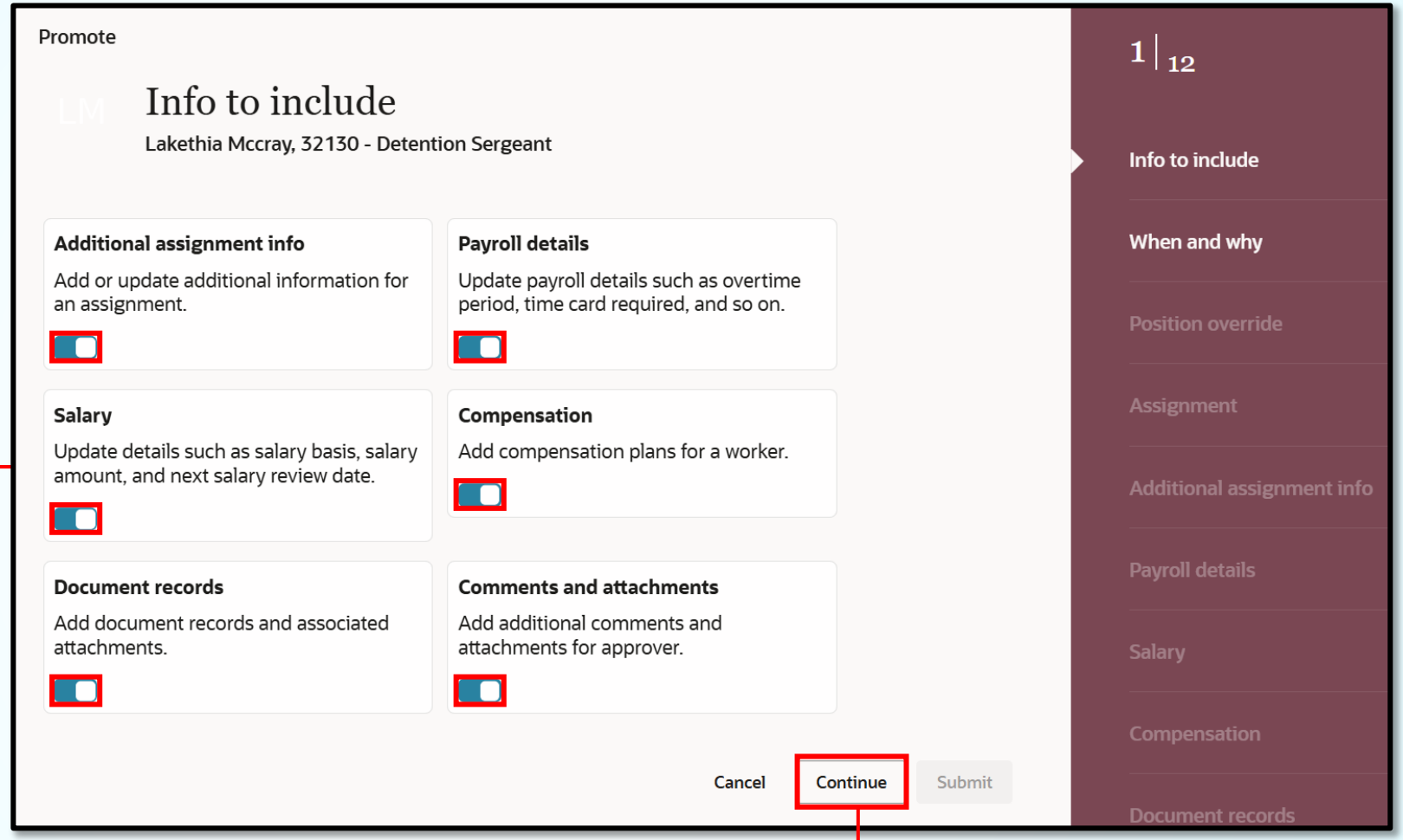

7

Do check in the boxes for the sections to be included in the process under **Info to Include** page

8

Click on **Continue** to move to the next section

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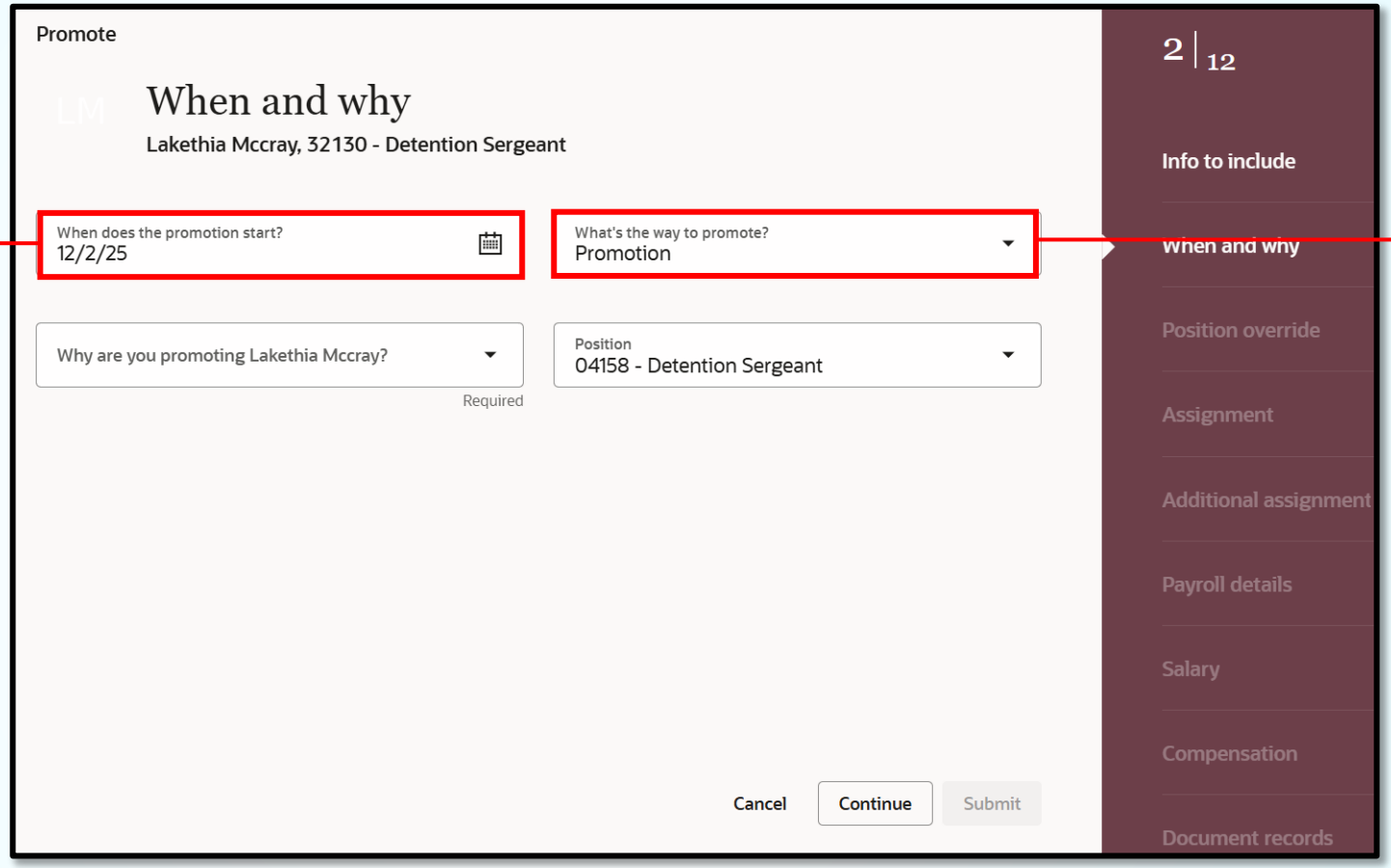
9

Select the appropriate **Promotion Start Date**



10

Promotion reason will be auto-populated in the **What's the way to Promote** dropdown list

You may also select the calendar icon and choose the date from the calendar.

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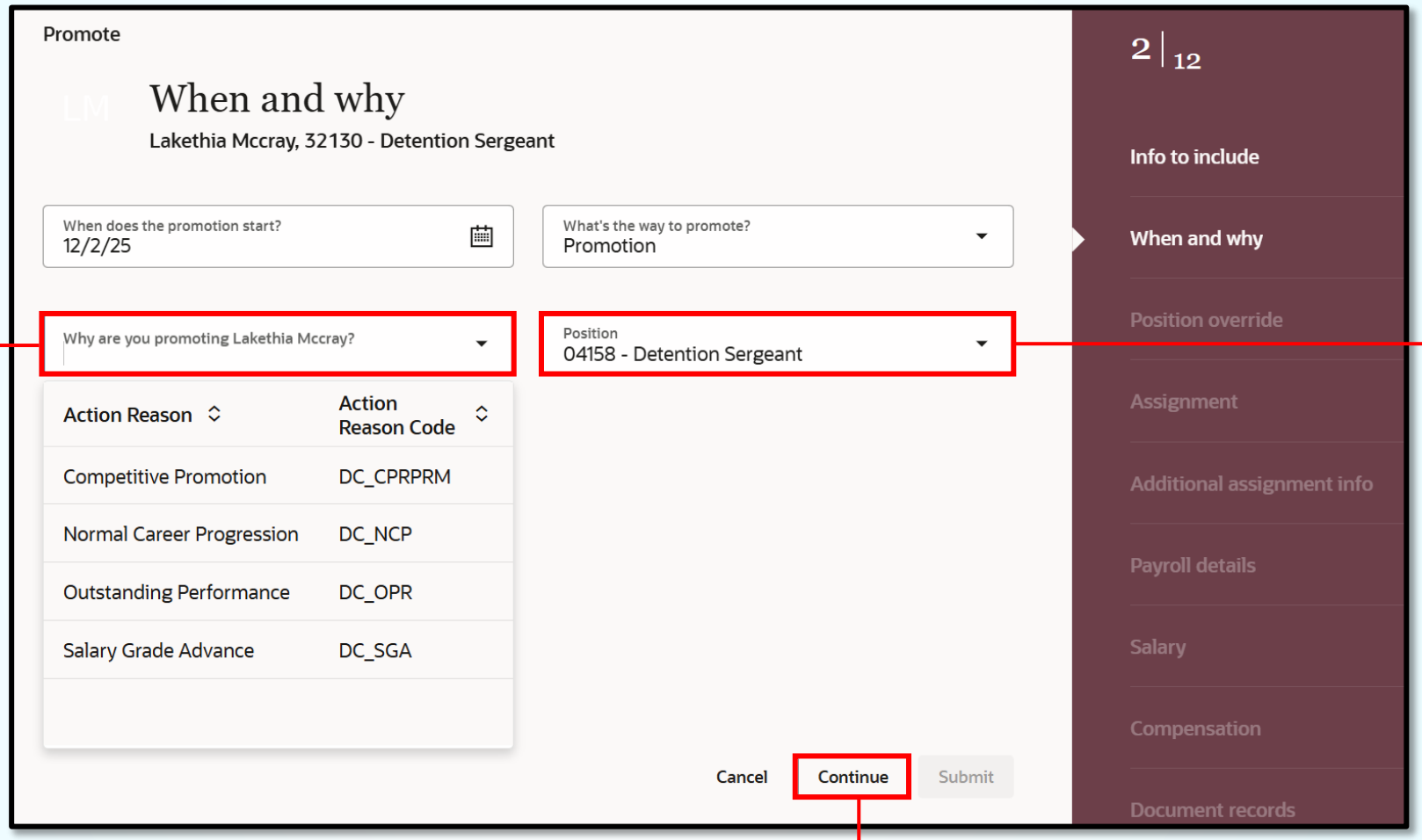

11

Select the appropriate **Reason** for the promotion from the **Why are you promoting Employee name?** drop-down list

12

Select the position in the **Position** Field

13

Click on **Continue** to move to the next section

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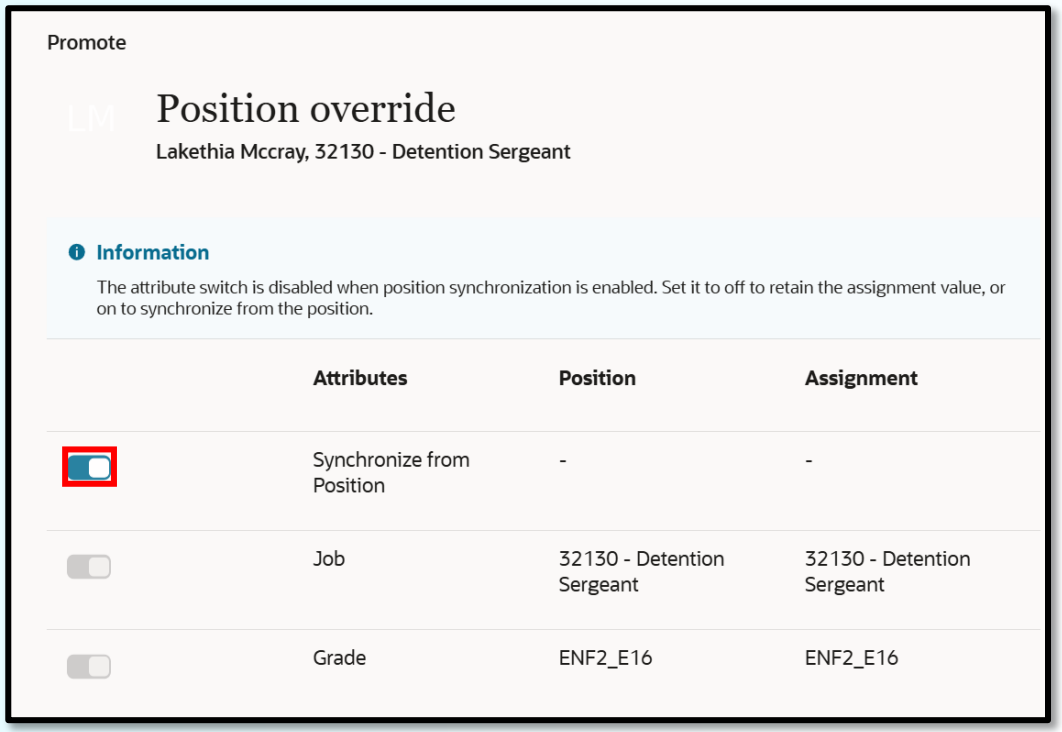

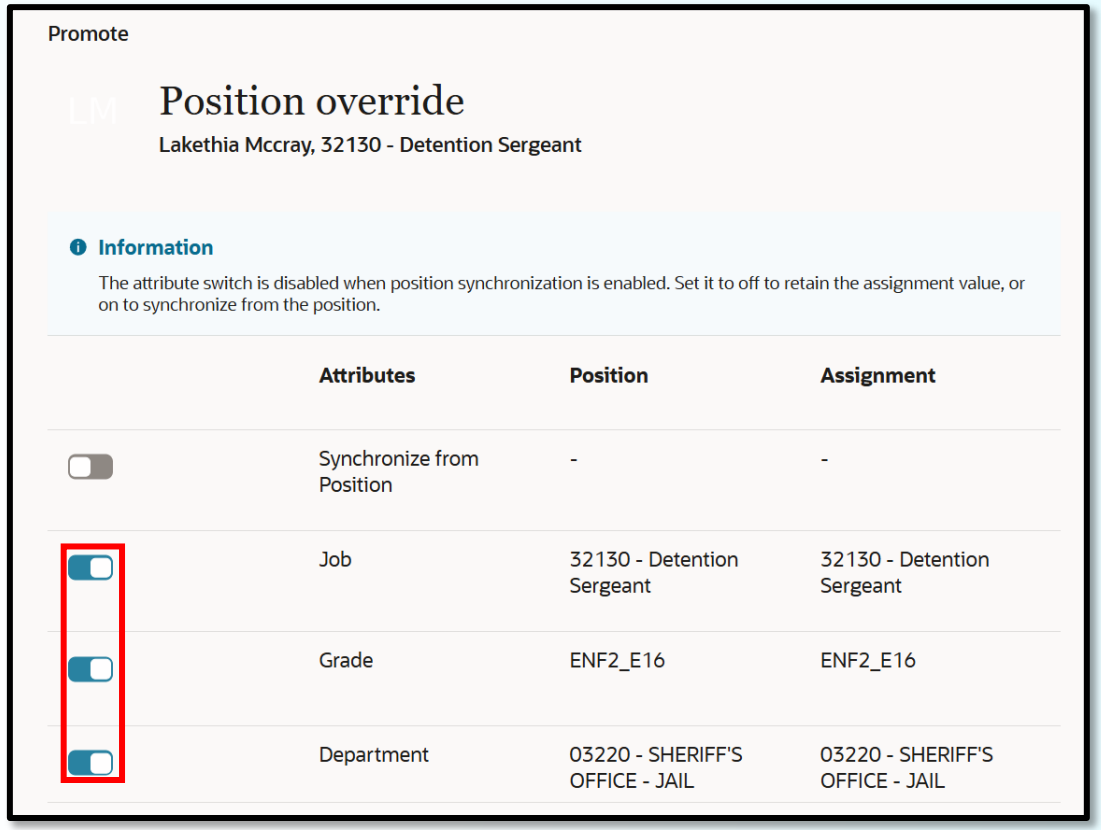

When Synchronization from Position is **enabled,** the switch is **disabled** for an attribute

- If Synchronization from Position is **disabled** and you want to keep the assignment's current value, set the switch to **off**.
- If Synchronization from Position is **disabled** and you want the assignment's value to match the value on the position, set the switch to **on**.

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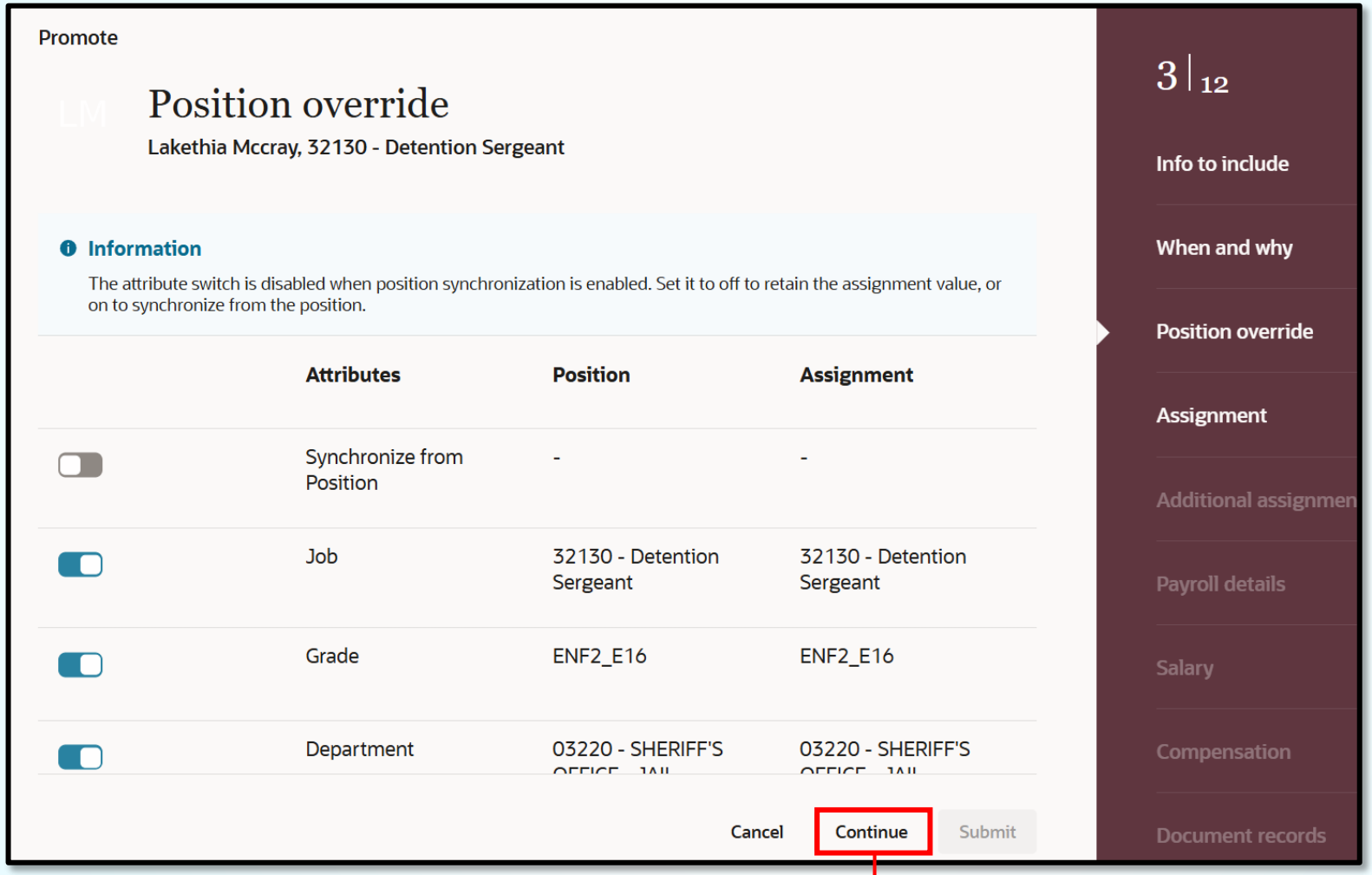

14

Click **Continue** to move to the next section

Troubleshooting

The attribute switch is disabled when Synchronization from position is enabled. Set it to off to retain the assignment value, or on to synchronize from the position.

Troubleshooting

When Synchronize from Position is set to Off, make sure the Location attribute is set to On to change the location on the Assignment page.

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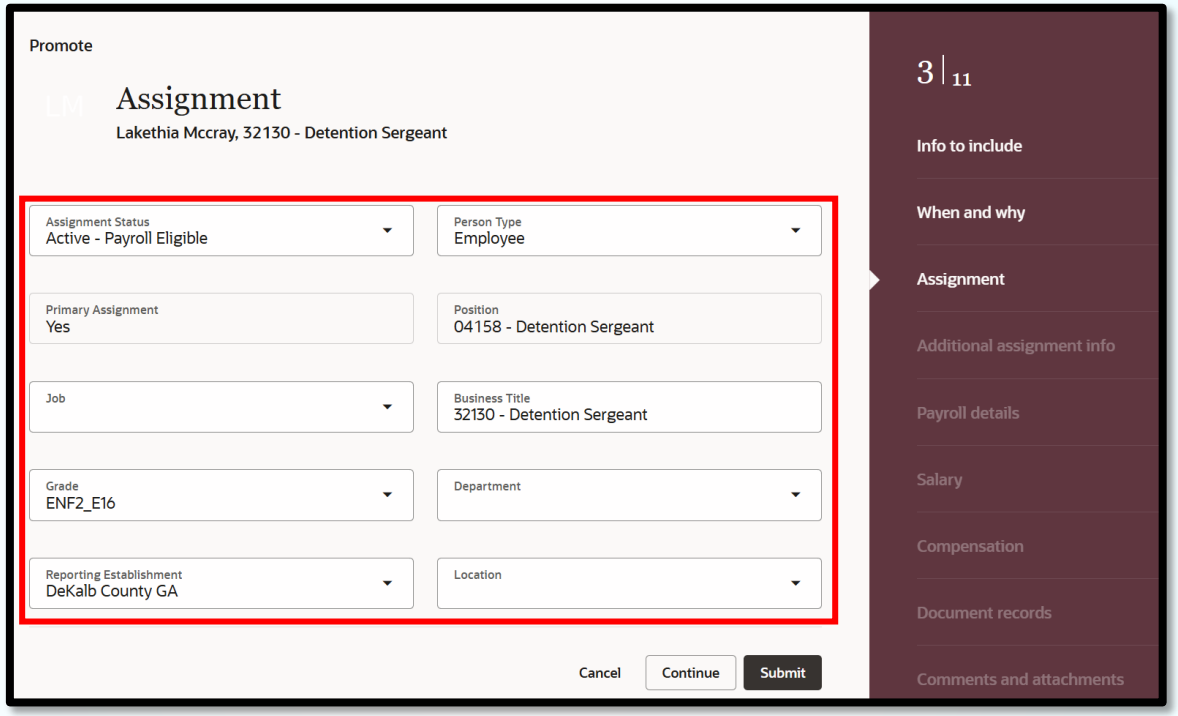

When Synchronize from Position is set to On, the fields are auto-populated and cannot be changed.

When Synchronize from Position is set to Off, attributes which are set to On can be changed on the Assignment page; otherwise, the fields are auto-populated and cannot be changed.

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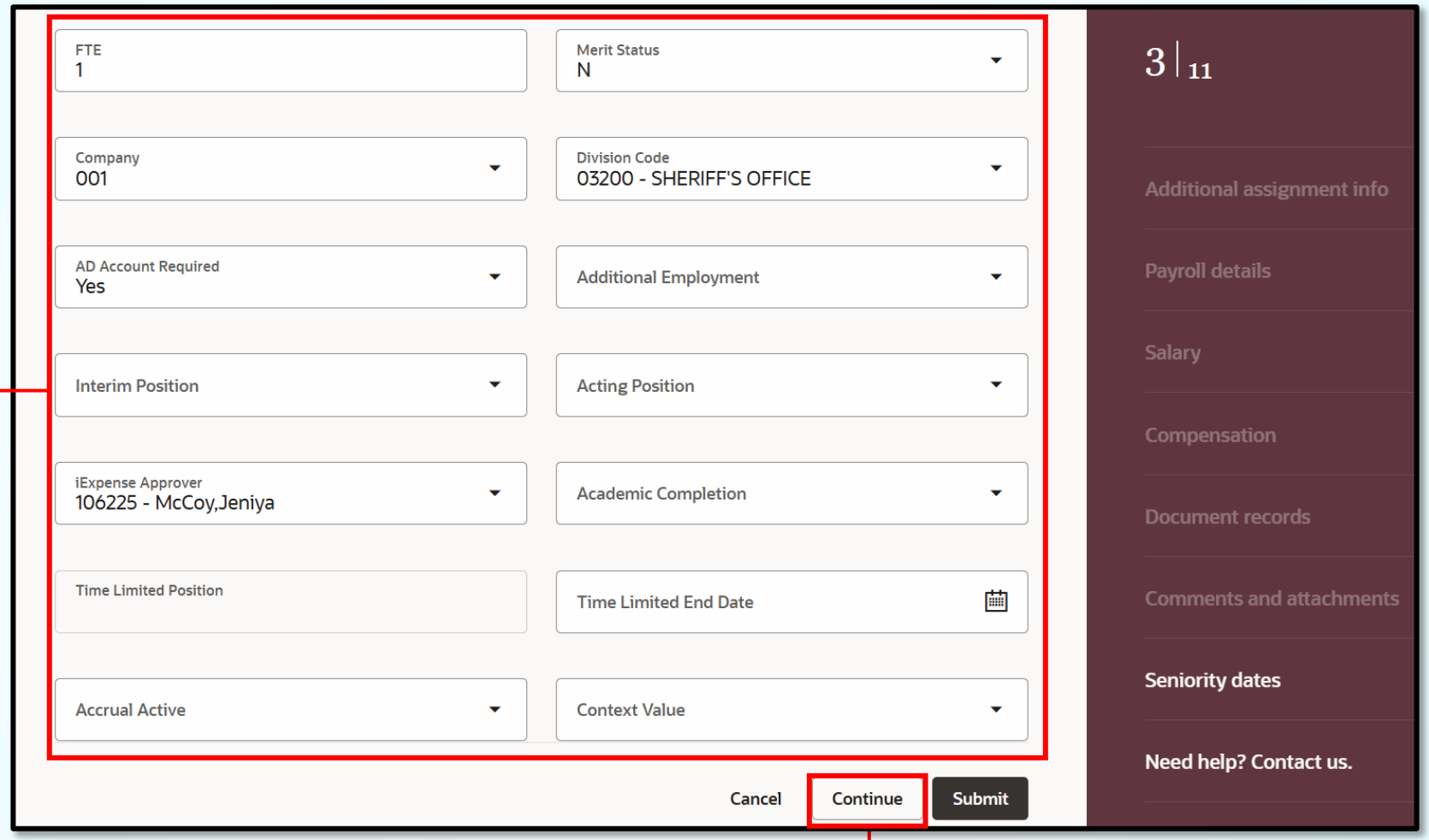
Update the other fields if required



16

Click **Continue** to move to the next section

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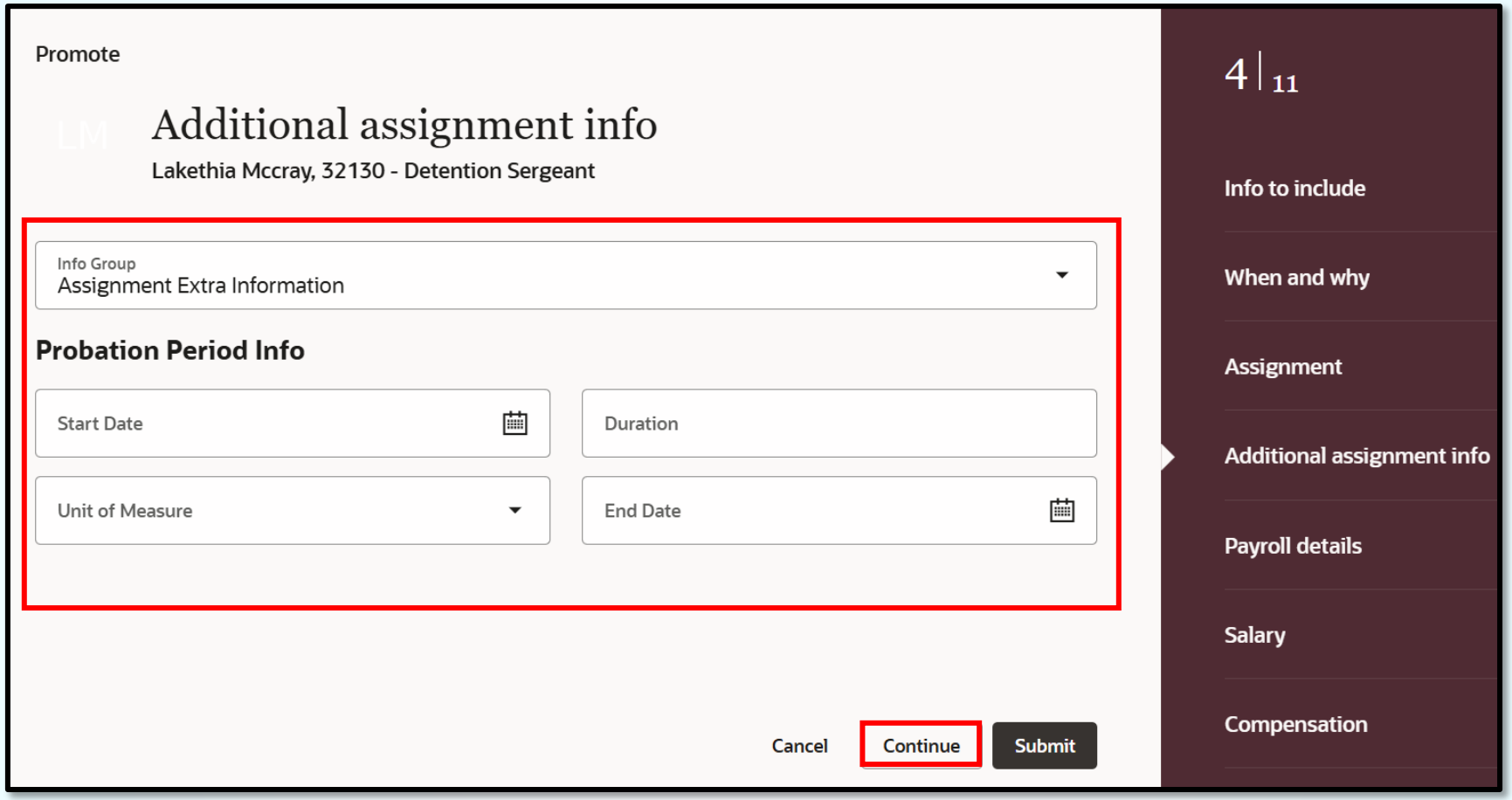

- The Coordinator can add Probation period information on the Additional Assignment Info page. Select the Start Date, key in the duration, and choose the appropriate unit of measure from the drop-down list. Then select the End Date.
- Click Continue after completing the required actions on the page,

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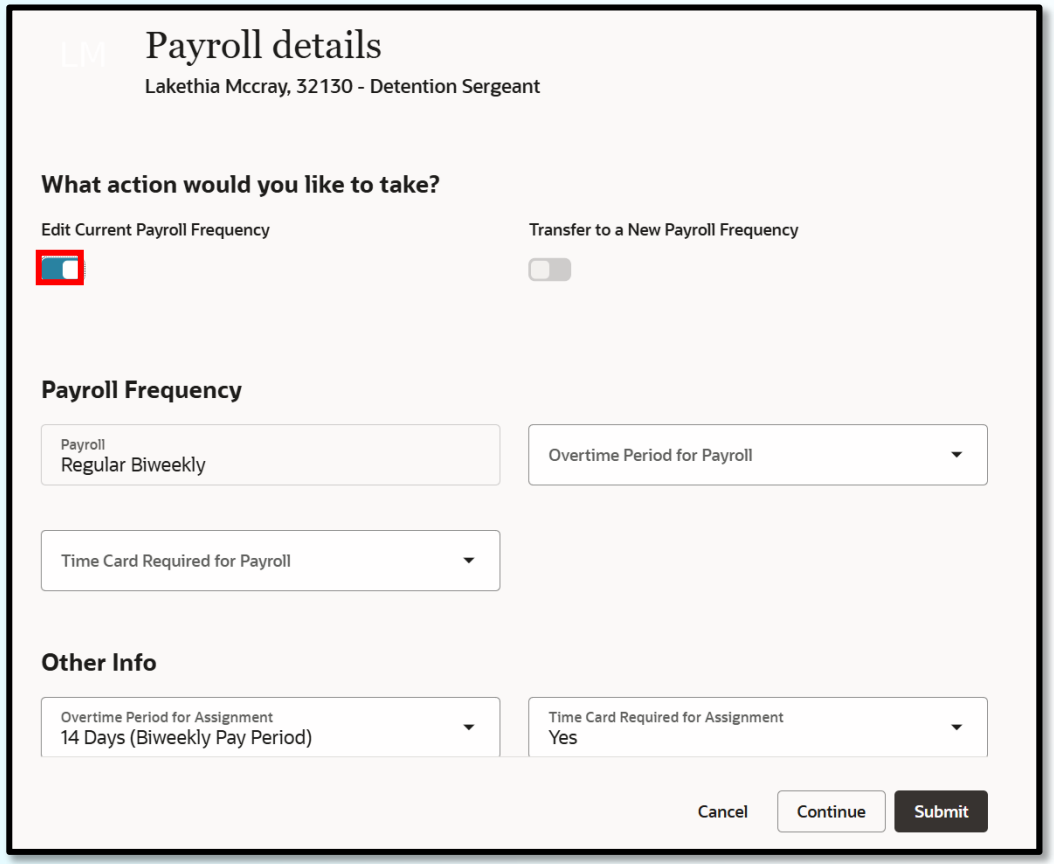

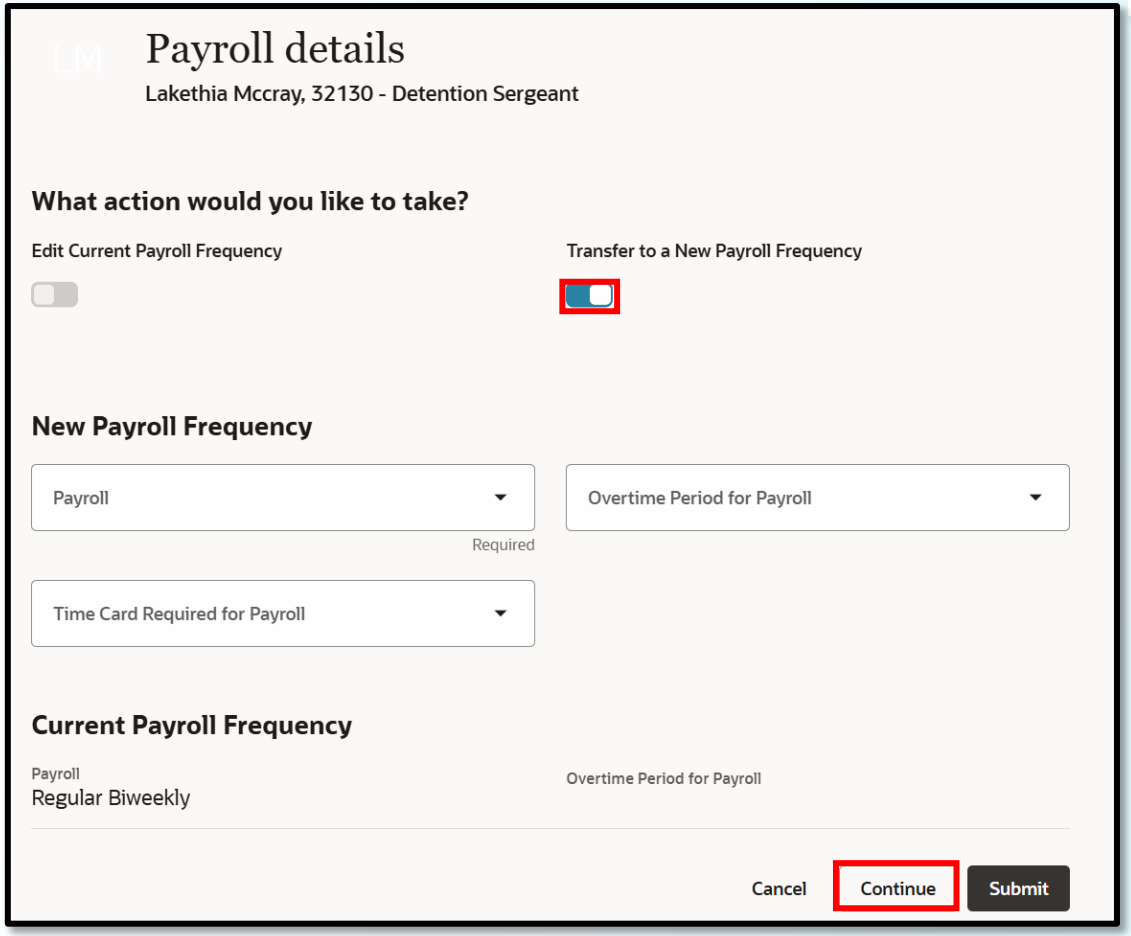

- The Coordinator can select the required action available from "**What action would you like to take**" field on Payroll details page.
- Click Continue to move to the next section

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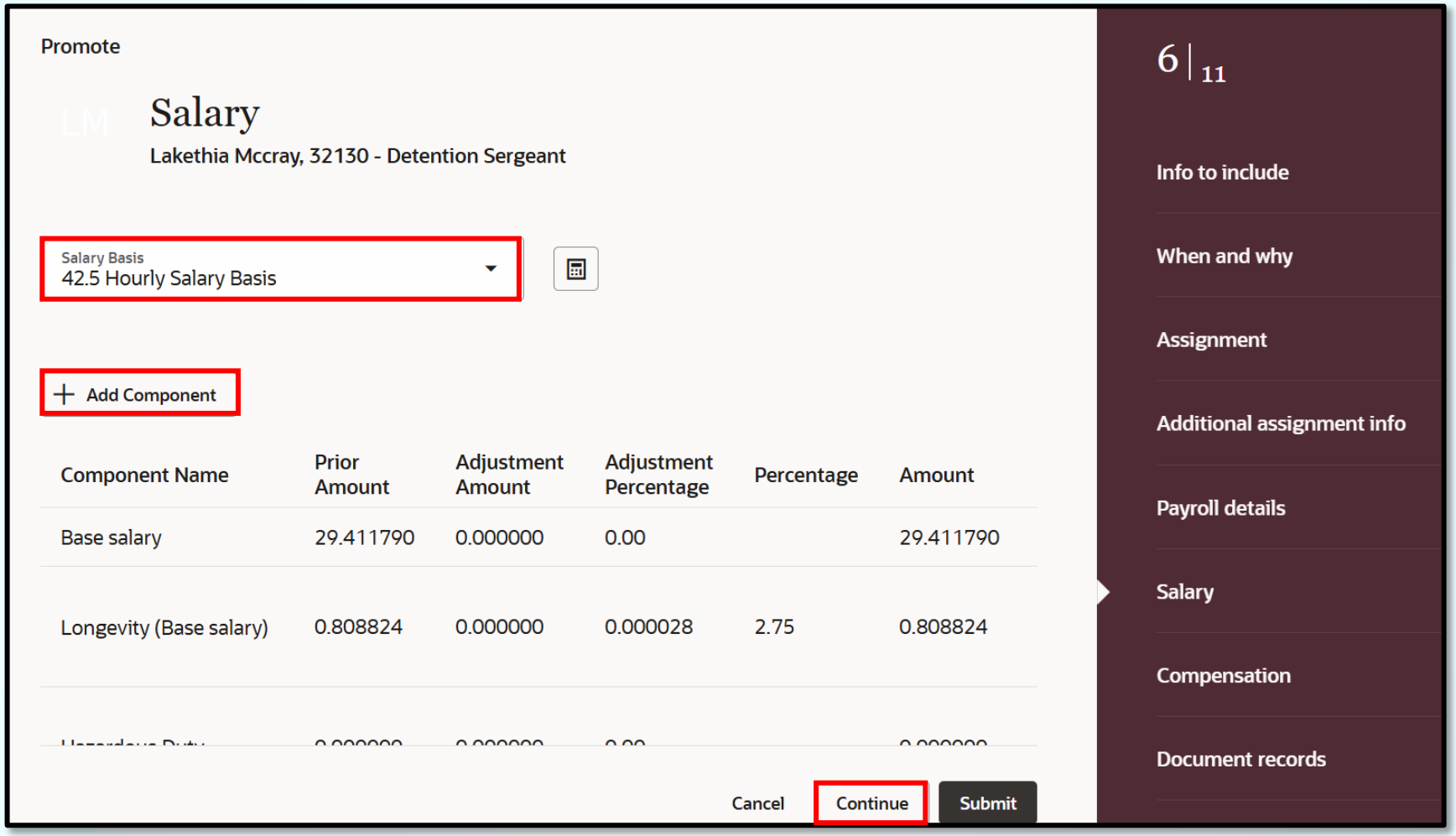

- The Coordinator can view the required details available on Salary page.
- Click on + Add Component to include new component in Salary details.
- Click Continue to move to the next section

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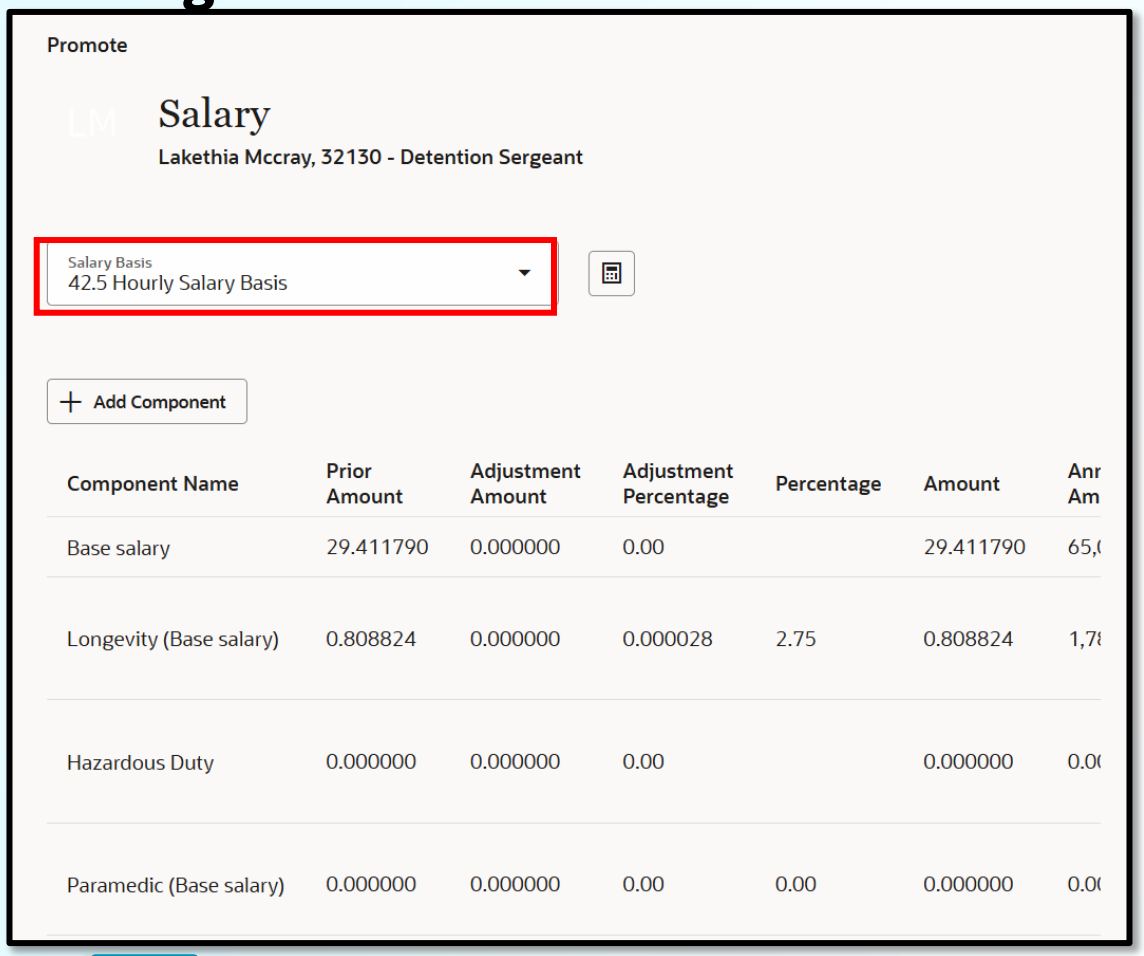

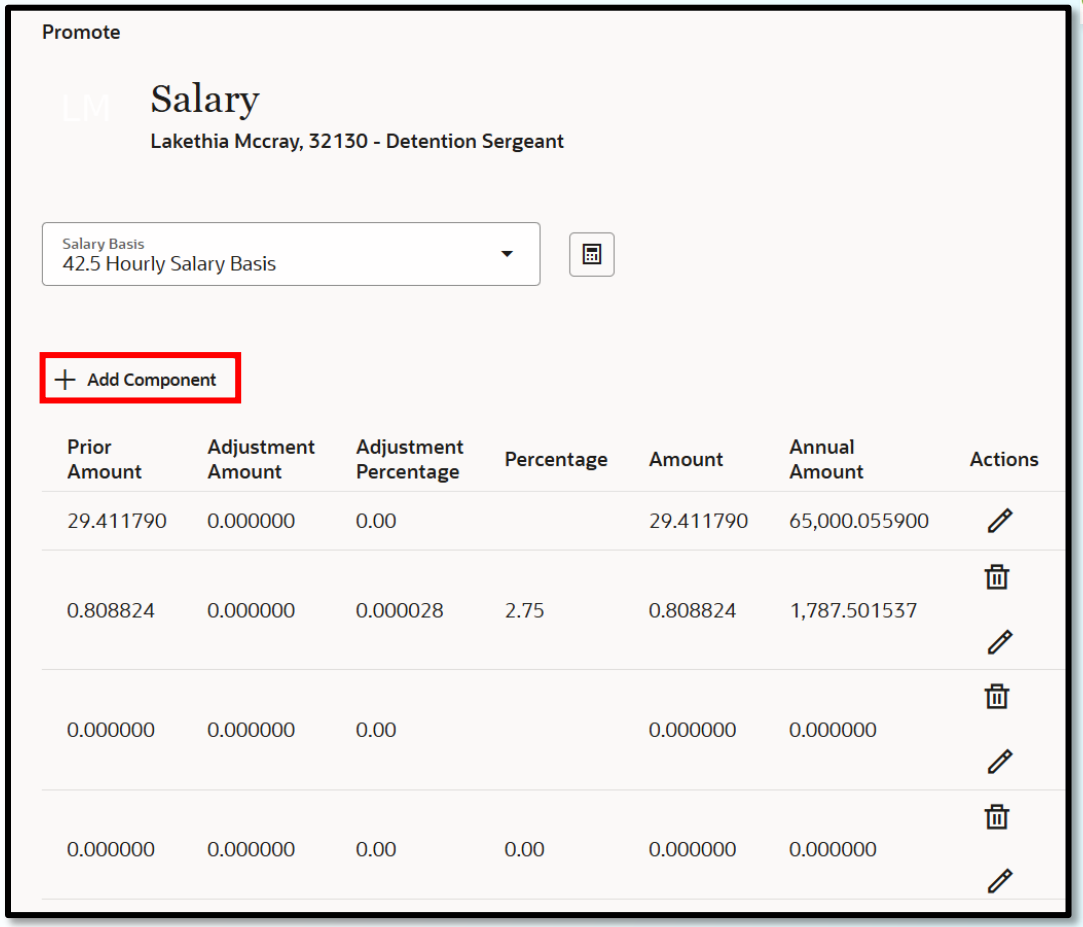

- Select Salary Basis to view the available components.
- Scroll right on the components sections to view the available actions to perform on the Components.
- To add new component, click on + Add Component

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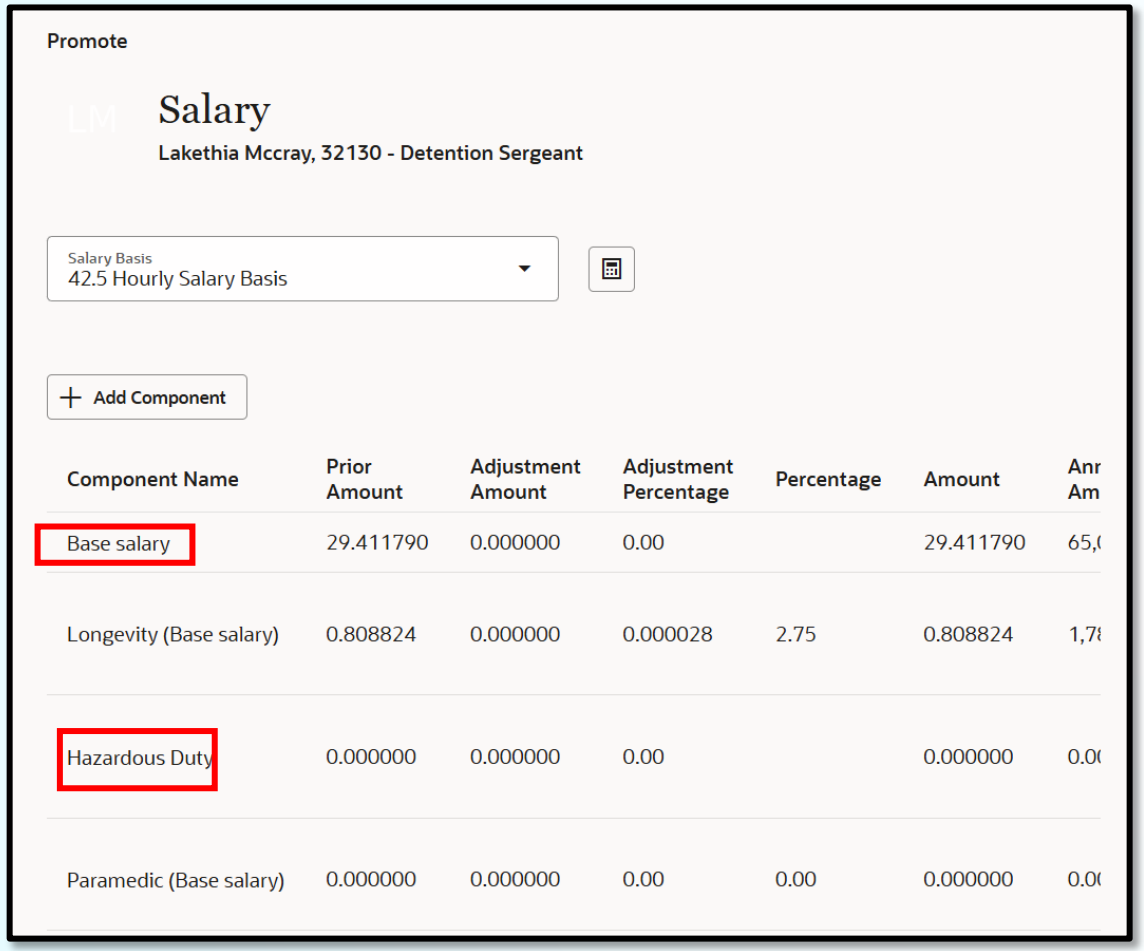

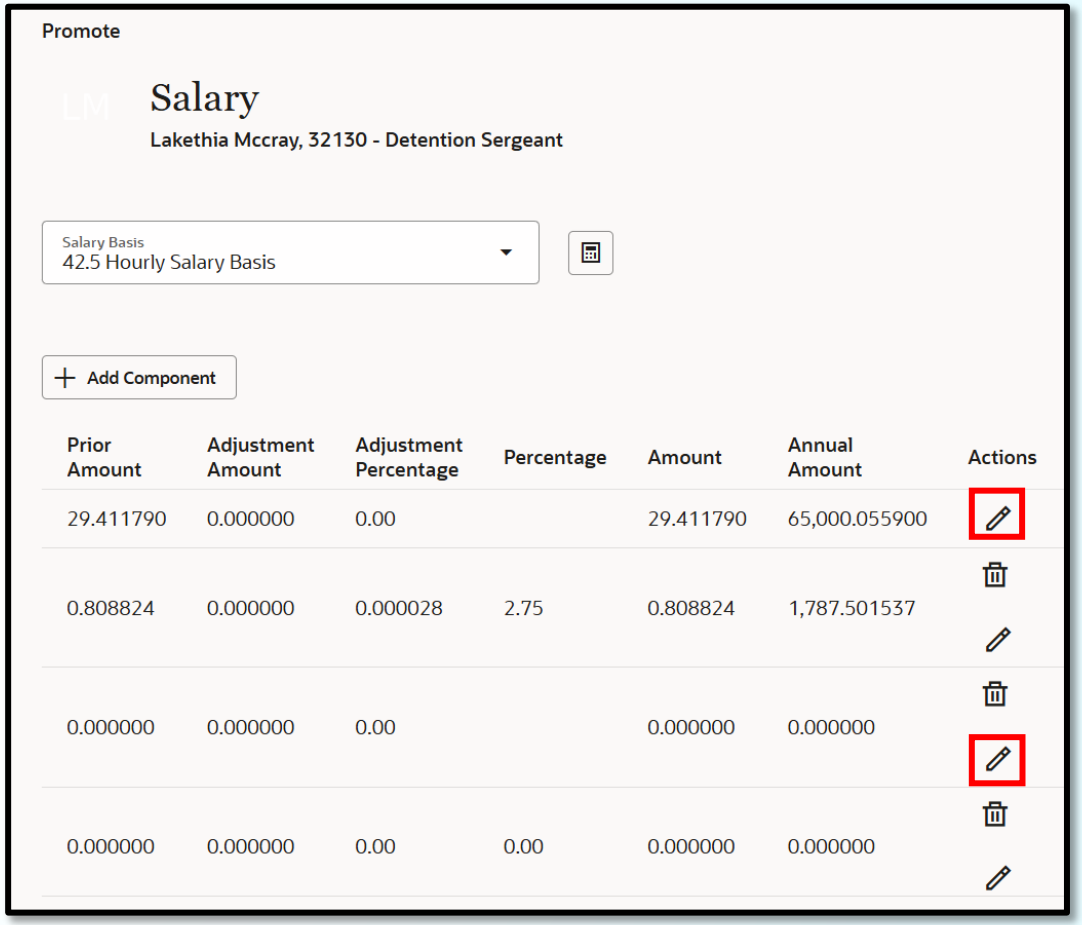

Click on Edit symbol and Key in the appropriate **Base Salary** and **Hazardous Duty** amount on the **Salary** section

Troubleshooting

If the Promotion comes with a Salary change, edit the amount in the **Salary Amount** field or key in an adjustment amount in the **Adjustment Amount** field. Based on which field is entered (Salary Amount or Adjustment Amount), the other field will be updated to reflect what was entered.

If the Salary Amount was entered, then the Adjustment Amount will be updated with the difference between the Current Amount and the newly proposed amount.

Troubleshooting

If payroll coordinators select the “Salary Basis” (**drop-down at the top of the Salary Details page**), it will blank out all the values (including base pay, longevity, hazard, paramedic, etc.).
The only time the drop-down would need to be selected is an FLSA non-exempt (hourly) employee promotes to FLSA exempt or if you are changing the standard hours (i.e., 40-to-53, 40-to-42.5, etc.).

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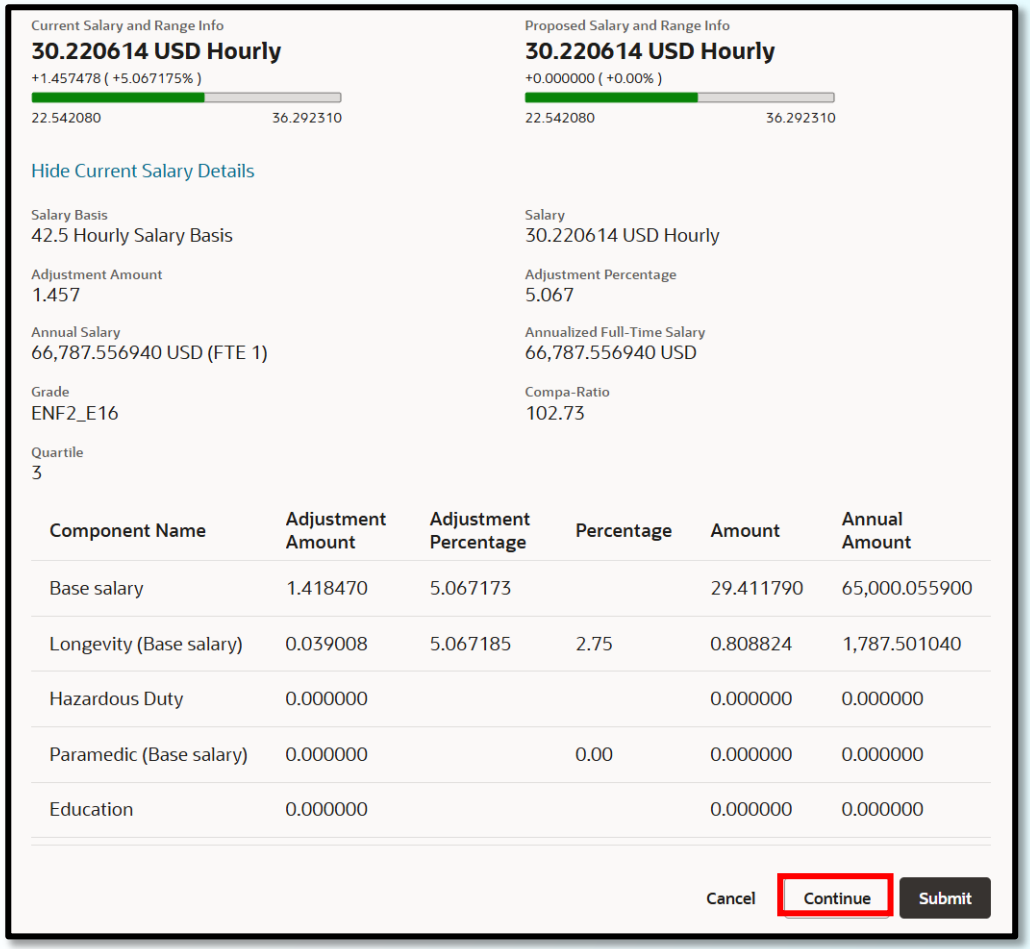

Scroll down to the bottom of the Salary section page and Click on Show Current Salary Details to view the current Salary details.

Click Continue to move to the next page after completing the necessary actions on the salary page

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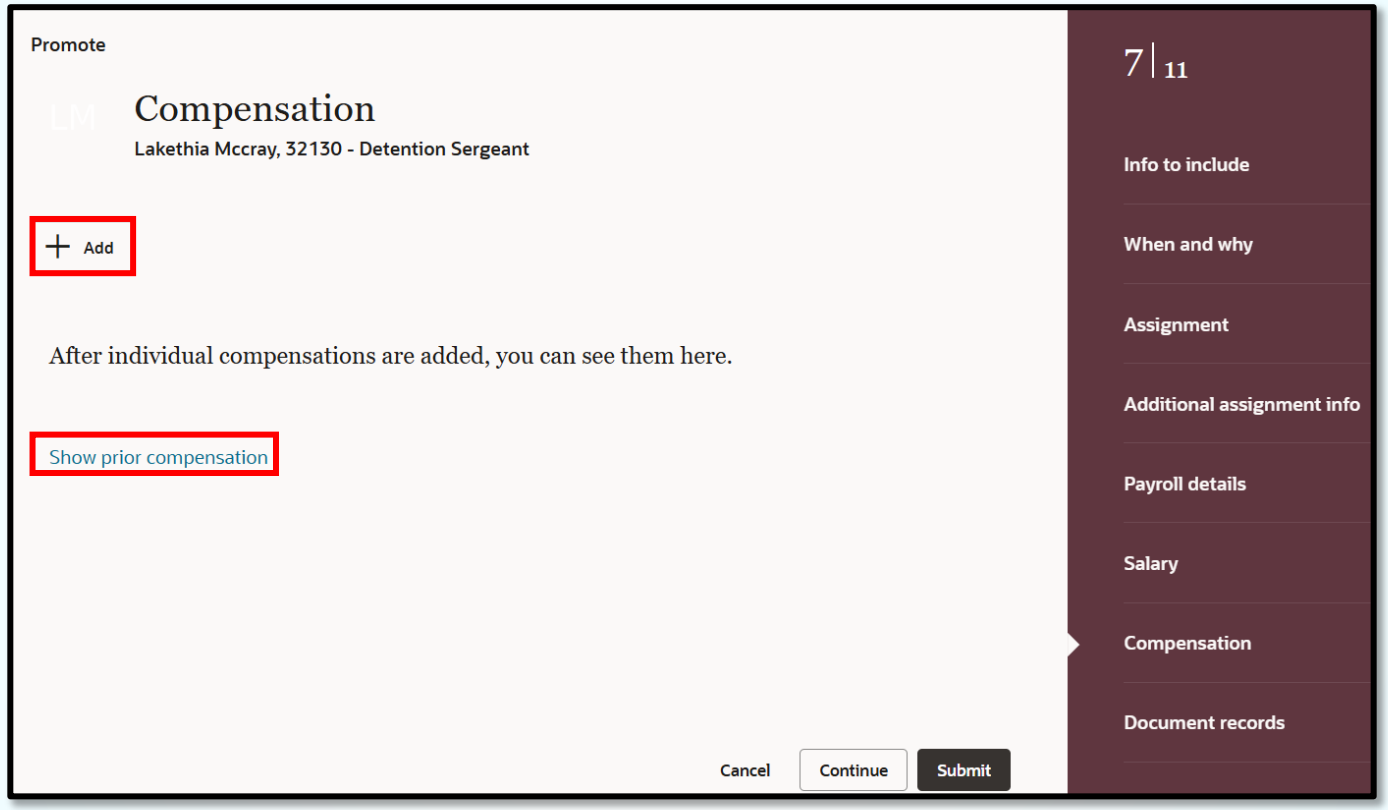

Click on Show prior compensation link to view the prior compensation details.
Click on + Add to add Additional Compensation

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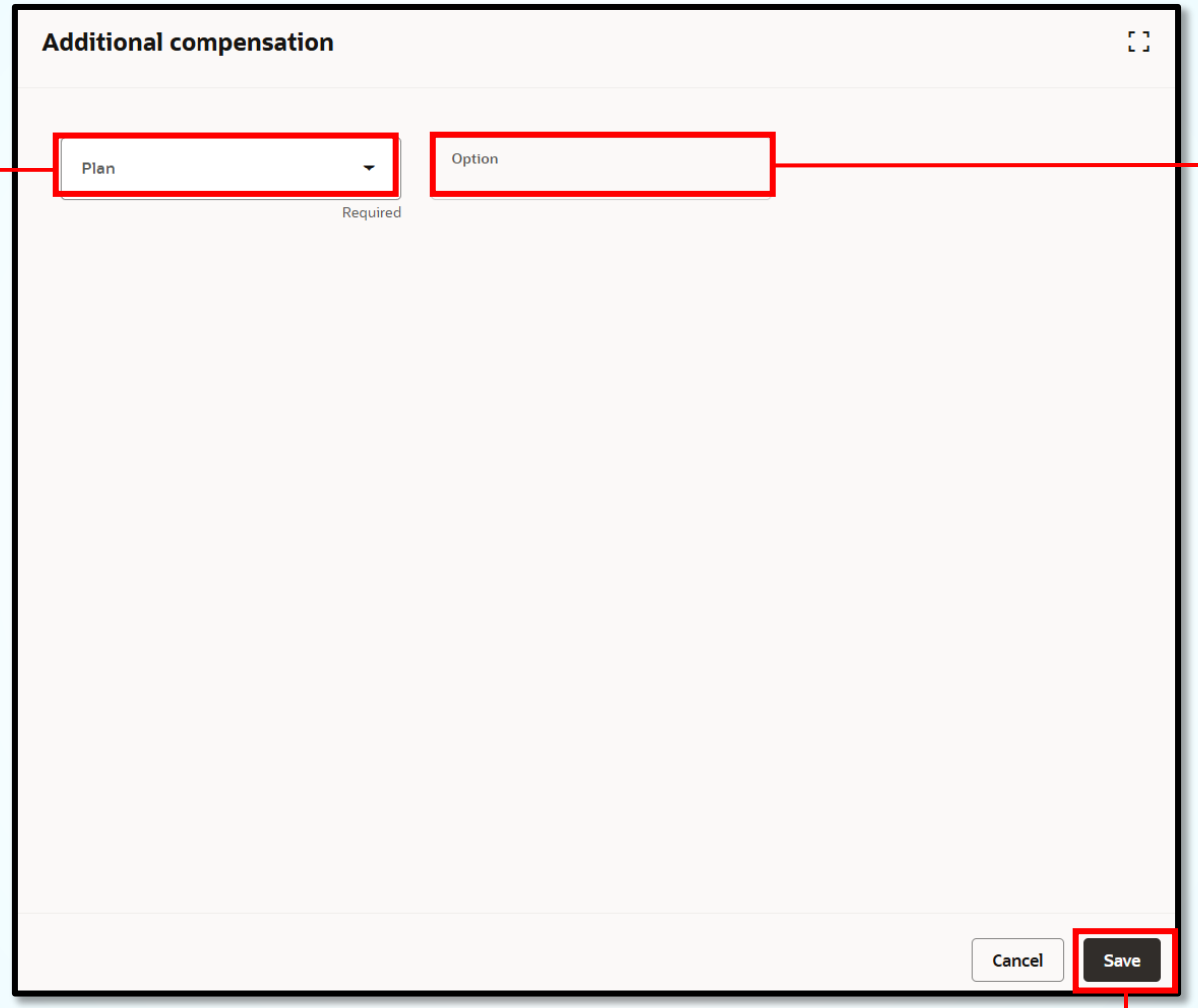
Select the appropriate **Plan** from the drop-down list



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Select the appropriate **Option** from the drop-down list

Click Continue to move to the next section

Click **Save**

19

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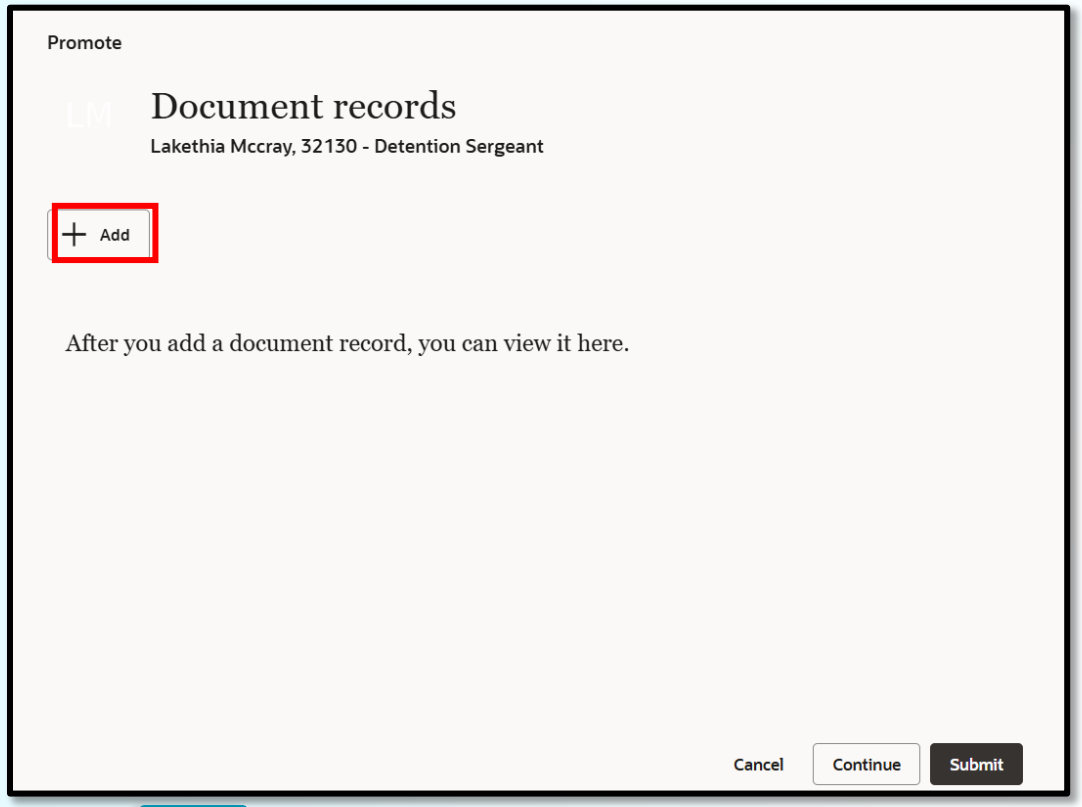

- The Coordinator can add Documents from Document records page
- Click **Add(+)** to add the new Document Record
- Select the **Document Type** from the List of Values and click **Save** after adding the Document
- Click **Continue** to move to the next section

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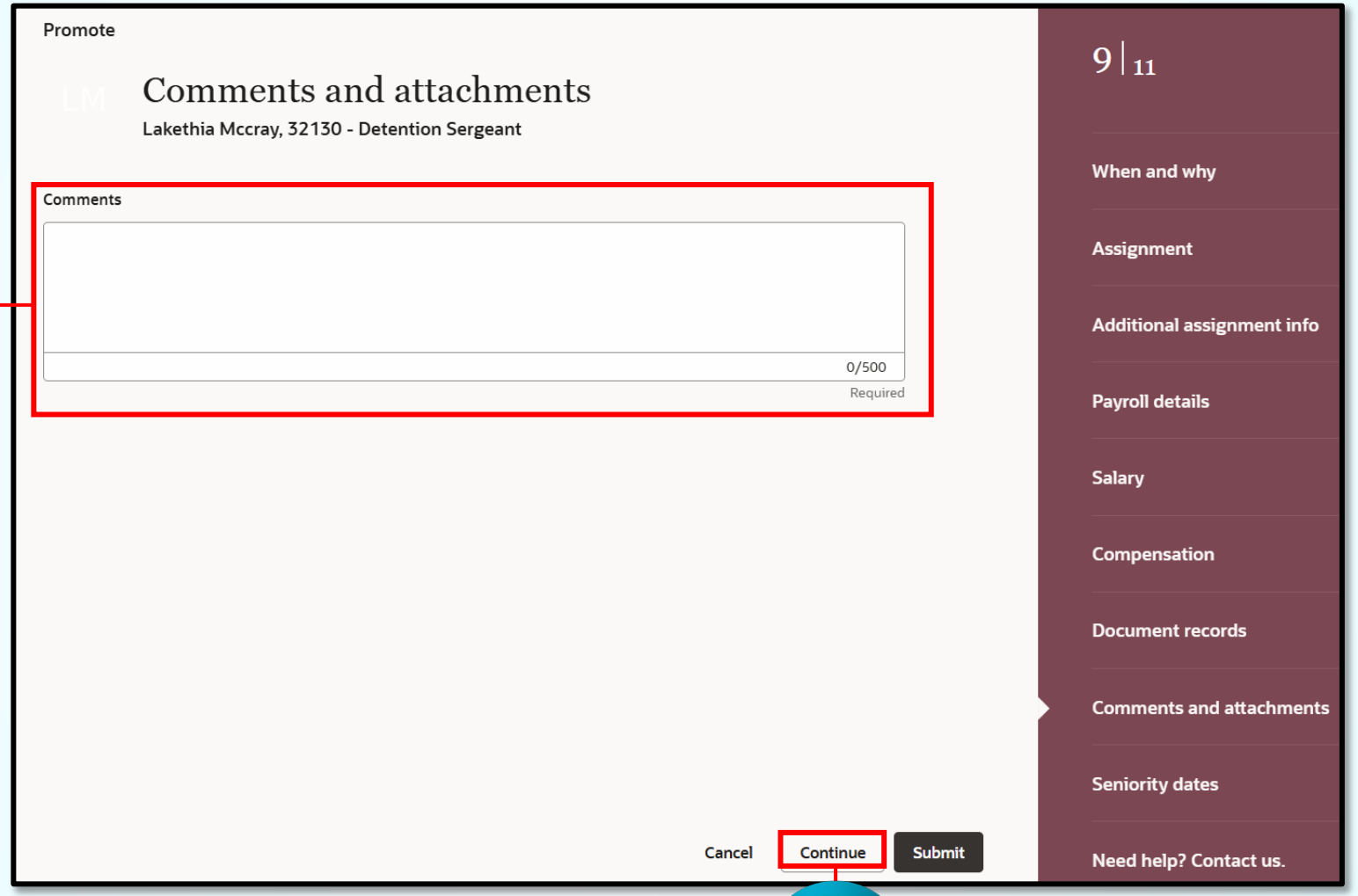

20

Enter necessary comments

21

Click Continue

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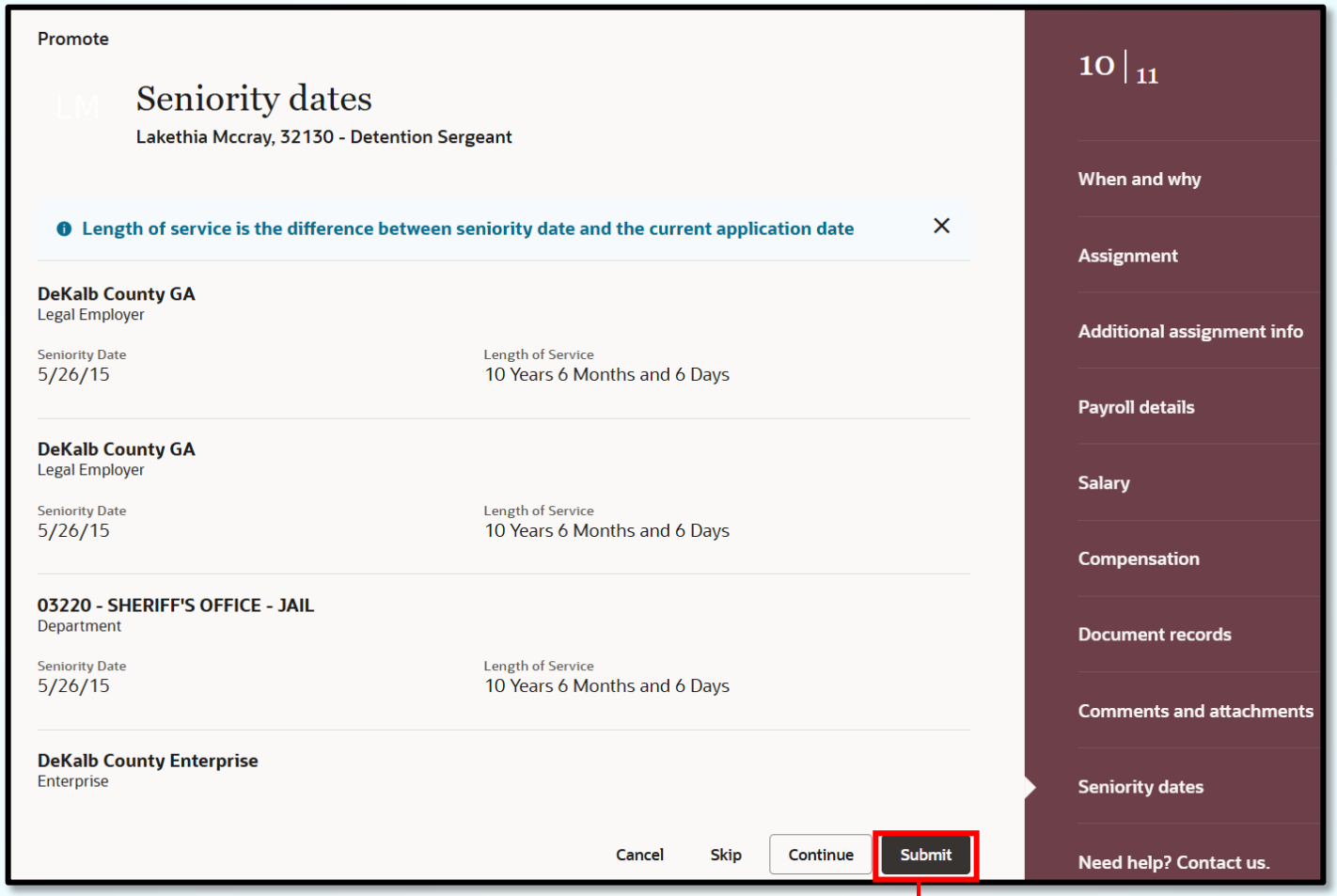

Click on **Continue** to navigate to **Need help?** Page if required help

22 Click **Submit**

Conclusion

- The learner can now select the employee and apply the Promotion Start Date. They can select the appropriate Promotion Reason and Position. This ensures the promotion is correctly initialized.
- The learner understands how position synchronization controls editable assignment fields. They can manage assignment values based on synchronization settings. This ensures correct assignment updates during promotion.
- The learner can now update Payroll details and Salary information. They can add components, update base salary, and review current and prior salary details. This ensures compensation is accurately recorded.
- The learner can now add Additional Compensation and Documents for the promotion. They understand how to save supporting records before proceeding. This ensures the promotion transaction is properly documented.