

Classification Action Form (CAF) Process

What is a Classification Action Form?

The Classification Action Form (CAF) is utilized by department managers to request an upgrade, downgrade, or reclassification of a position to another existing job code and title. The CAF process is from October 1st to April 1st to be effective the first date of the following fiscal year, October 1st, after City Council has approved the Position Classification Allocation (PCA). Compensation would request that if CAF is for a new job title that the department works with the Compensation team prior to submitting CAF to establish a title and grade first. The form requires approval from Department Director, Budget & Management Services Director or Assistant Director, Department Deputy/Assistant City Manager, and HR Compensation.

Department Workflow

(Completed by Manager, Admin Support, or Departmental Budget Staff)

1. Complete Sections A – C and E – F; complete Section D only if Job Overlap is requested.

Section A: Indicate whether the position is vacant and complete current and proposed information for the position.

- **Position Number:** This is “PM” followed by a 6-digit number. Please include “PM” and all digits.
- **Employee Number:** The ID number for the employee currently in the position. If the position is vacant, leave blank.
- **Employee Name/Contact Information:** The employee’s name and phone number. If the position is vacant, leave blank.
- **Supervisor’s Name/Contact Information:** The employee’s current supervisor and their phone number.
- **Class Code:** The 5-digit Job Profile number, found in Workday.
- **Position Title:** The name of the position, e.g. Office Assistant I
- **Grade:** The Compensation Grade in Workday, found under the “Compensation” tab of the Job Profile page.
- **Fund:** The 4-character Advantage Fund, found on the PM’s page in Workday.
- **Cost Center:** The 4-character Cost Center, found on the PM’s page in Workday.
- **Sup Org:** The Organization ID for the PM’s supervisory organization, which can be found on the PM’s page in Workday. The Organization ID is typically formatted as SUP_####, for example: SUP_0762.
- **Fiscal Year:** The fiscal year date(s), e.g. 2022-2023 or 2023 for the fiscal year of Oct 1, 2022 – Sep 30, 2023.

Section B: Only one Classification Action (Reclassification, Upgrade, Downgrade) may be selected.

- Reclassifications are for same grade to same grade changes
- Upgrades are for proposed positions in higher grades
- Downgrades are for proposed positions in lower grades

Section C: Indicate the current funding information, proposed funding information, and any variance between them, complete all columns in this section.

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- **Pension** = Current or Proposed Salary × Pension Percentage (check with Budget on the current pension percentage)
- **Medicare (FICA)** = Current or Proposed Salary × Medicare (FICA) Percentage (1.45%)
- **Total** = Sum of Values in Column
- **Variance** = Proposed - Current

Section D: Complete only if Job Overlap is requested.

- Check Job Overlap box and attach the letter related to retirement, resignation, or termination to the CAF.

Section E: Describe current and new additional responsibilities for the proposed position, as well as justification for the change and, if applicable, how financial impact of Job Overlap will be addressed.

- Additional documentation attached can include job descriptions for the current and/or proposed titles.

Section F: Department Director or their designee signs and dates to approve the CAF.

Section G: Office of Budget & Management Services indicates their recommendation of support or no support and the Director or Assistant Director signs and dates.

Section H: Deputy or Assistant City Manager over the requesting department signs and dates.

- The Deputy or Assistant City Manager signature of approval moves the process forward despite Budget recommendations of “Not Supported” and “Signed without Support”. The Deputy or Assistant City Manager may consider that the business case outweighs the financial impact.

Section I: Compensation Analyst signs and dates to support or not support the proposed change and the Human Resources Director, Assistant Director, or designee signs and dates with approval.

1. Send to Office of Budget & Management Services Senior Budget Analyst for Budget Director/ Assistant Director recommendation and signature.
2. When returned from Office of Budget & Management Services, send to Department Deputy or Assistant City Manager (DCM/ACM) for signature.
3. When returned from Department DCM/ACM, send to HR Compensation team at HRCompensation@dallas.gov for Compensation Analyst signature and Human Resources Director/Assistant Director/Designee signature.
4. When returned from HR Compensation, you may request that vacant PMs on approved CAFs be updated accordingly in Workday for recruitment purposes. If not vacant, PM and employee will be updated the first pay period of the following fiscal year (October) pending City Council approval of Position Classification Allocation.

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HR Compensation Workflow

(Completed by Senior/Compensation Analyst)

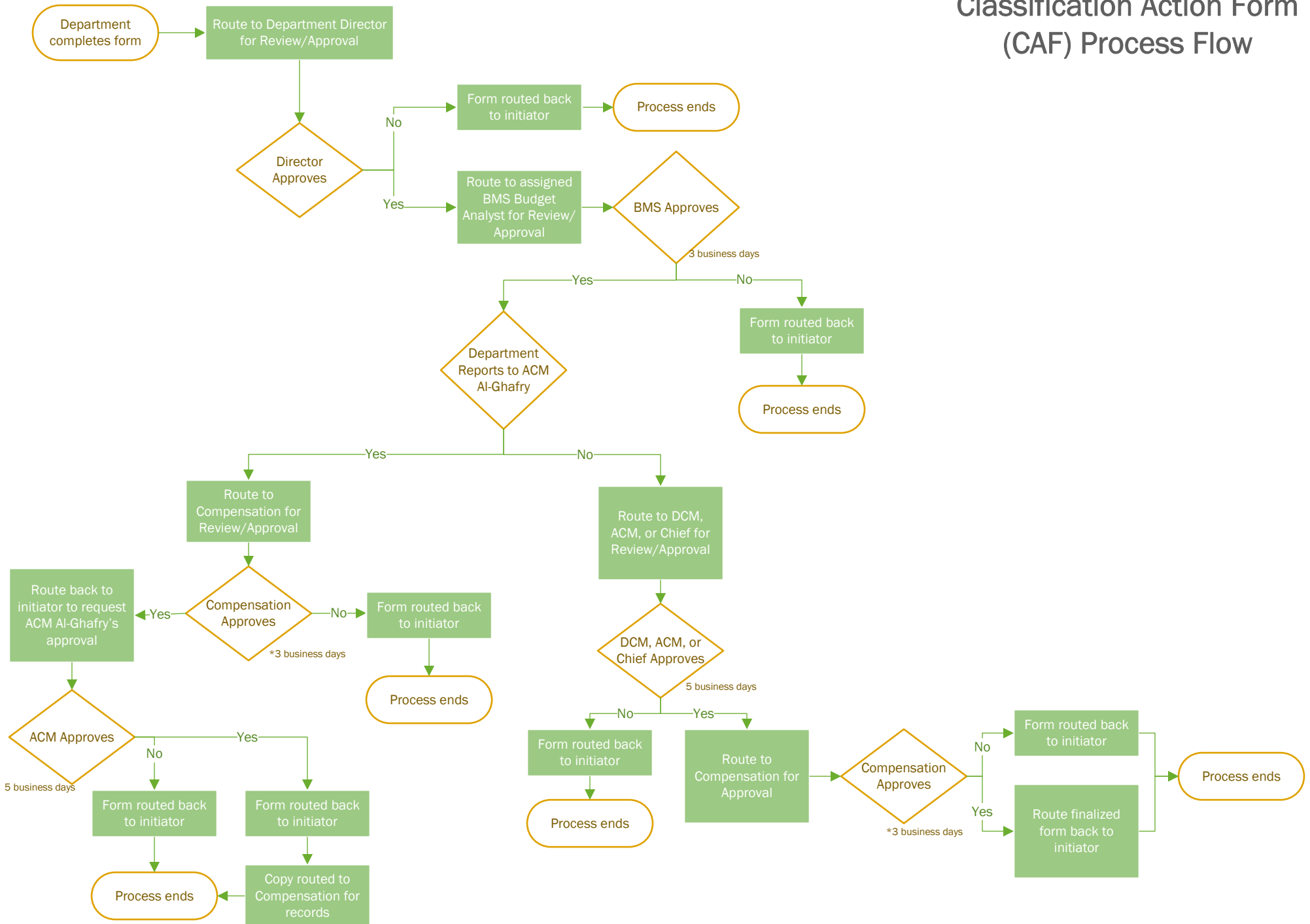
1. Receive form and confirm that it is the correct version (Version 10/01/2022).
2. Confirm that all signatures have been completed.
 - a. With the exception of CAFs for departments under ACM Majed Al-Ghafry, Department ACM signature must be completed for HR Compensation review.
 - b. Regardless of Office of Budget & Management Services recommendation, if Department ACM has signed, HR Compensation must process CAF.
3. Verify information in Section A:
 - a. Confirm that current position information matches PM information in Workday.
 - b. Confirm that proposed class code information (position title and grade) matches information in Workday.
4. Verify that only one Classification Action has been requested and that it is the correct action based on the position grade change reason (Upgrade, Downgrade, Reclassification).
5. Verify that information provided in Section E is sufficient and aligns with CAF guidelines.
6. Indicate whether the proposed change is supported, sign, and then send to the Human Resources Director/Assistant Director/Designee to sign.
7. Return form to department sender. If PM is vacant, ask sender if they would like PM updated for recruitment purposes.
8. Log CAF to record requesting department, current and proposed, position, received and approved dates, etc. for HR Compensation records and Position Classification Allocation purposes.

Timeline of Completion

Action	Time to Complete
Initiate (department responsibility)	
Department Director review	5 Business Days
Deputy/Assistant City Manager or Chief review	5 Business Days
Budget & Management Services review	3 Business days
HR Compensation review	3 Business days*
HR Director or Assistant Director Review	Included in HR Compensation review

*Process may take up to 2 business weeks if the form is requesting a new title be created; job description review, time to collect relevant market data and make recommendations on title and grade.

Classification Action Form (CAF) Process Flow



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