

Career Series Classification Action Form (CAF) Process

What is a Career Series - Classification Action Form?

The Classification Action Form (CAF) is utilized by department managers to request an upgrade, downgrade, or reclassification of a **VACANT** career series eligible position to another existing job code and title **WITHIN THE SAME** City of Dallas approved Career Series. The form requires approval from Department Director, HR Compensation, and Budget & Management Services Director or Assistant Director.

Department Workflow

Section A: Confirm 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. Engineer 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., 2023-2024

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.

Career Series Classification Action Form (CAF) Process

- **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: Describe current and new additional responsibilities for the proposed position, as well as justification for the change. Additional documentation attached can include job descriptions for the current and/or proposed titles.

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

Section F: 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.

Section G: Office of Budget & Management Services indicates their recommendation.

Instructions for Submission.

1. When returned from Department Director, send to HR Compensation team at HRCompensation@dallas.gov for Compensation Analyst signature and Human Resources Director/Assistant Director/Designee signature.
2. HR Compensation will send to Office of Budget & Management Services Senior Budget Analyst for Budget Director/ Assistant Director recommendation and signature.
3. If approved by BMS and returned from HR Compensation, vacant PMs on approved CAFs be updated accordingly in Workday for recruitment purposes.

Career Series Classification Action Form (CAF) Process

HR Compensation Workflow

(Completed by Senior/Lead/Compensation Analyst)

1. Confirm that all signatures have been completed.
2. Verify information in Section A:
 - a. Confirm that current position information matches PM information in Workday and is **part of an approved Career Series.**
 - b. Confirm that proposed class code information (position title and grade) matches information in Workday and **is part of an approved Career Series.**
3. 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).
4. Verify that information provided in Section E is sufficient and aligns with CAF guidelines.
5. Indicate whether the proposed change is supported, sign, and then send to the Human Resources Director/Assistant Director/Designee to sign.
6. Send the form to BMS for final approval.
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	2 Business Days
HR Compensation review	2 Business Days
HR Director or Assistant Director Review	Included in HR Compensation review
BMS Review	2 Business Days

Career Series CAF Process Flow

Updated: 06/27/2024

