Employee Change Form

Instructions
The employee change form provides information needed to request a change in employment status for staff. Any changes to employee information need to be submitted using this form.

NOTE: This form is not intended to replace interdepartmental communication on changes to employee information.

**Security**
Due to the confidential nature of the data, the employee change form is secure and access to submit or review a form is only permitted by the employee's direct or indirect supervisor. Employees cannot access or submit their own requests.

If you are off campus or at an unsecure location, a VPN connection must be used.

**Approval Workflow & Notifications**
The system will automatically assign each request into a specific workflow based on the type of request submitted. Notification emails are distributed by the system upon approval/review of the request. Supervisors are notified via email when the request has been finalized and the data has been changed in the system.

Supervisors can review the progress of the approval process at any time.
Accessing the Form

1. WesPortal> Manager’s Toolbox; a supervisor can find the link to the employee change form after selecting a supervisee from either the Direct Reports or Indirect Reports menu. Using this method will pre-populate the employee id in the search page. Supervisors need to click the ADD button on the search page to begin the request.

2. Peoplesoft HRMS; under Wesleyan Menu > Manager’s Toolbox > Employee change form.

Supervisors arepresented with a new change request and will need to input the WesID of the employee.
Locate Existing Forms

To locate an existing form, click the tab labelled *Find an Existing Form.*

Provide the *Change Request ID* number or name of the employee. If the employee has had multiple requests prior to the current, all of the previous requests will populate. Select the appropriate form. Requests can be filtered by the *Effective Date* or by the Form Status of *Draft* or *In Workflow.*

Form Layout

- There are 6 areas of the Change Form
  1. Current Employee Information Panel -- Provides the supervisor with the employee’s current position details
  2. Employee Change Options -- A listing of the available actions for an employee
  3. Attachments -- Documentation in support of the requested change
  4. Funding Source Field -- An open field box to provide funding information for compensation and/or FTE changes
  5. Comments Field -- An open field box to offer additional comments
6. Action Buttons
7. Form Status & Workflow

**Current Employee Information**

![Employee Information Table]

This panel will display the current information for the employee, including:
- Position number, title and standard hours
- Supervisor name and ID
- Department
- Current status
- Current pay rate
- FTE

**Change Options**

This section is completed by supervisors for changes to their supervisees. Supervisors can select multiple change actions by selecting the appropriate checkboxes. Certain change actions require documentation and/or attachments to be provided before submitting the form.

**Requested / Approved Effective Date**

Supervisors need to provide an effective date for the change. The date of the change must be equal to or greater than the date filling out the form. If there is any reason during the approval process that the date is determined to be different than the requested date, it will be displayed under the approved effective date.
**Compensation Change**

- **Compensation Change**

  - Check reason(s) for this request.
  - [ ] Significant change to on-going responsibilities
    - Required: Attach a word document of the current job description with track changes to show the additional or change in responsibilities.
  - [ ] Other

This action is used for changes to base pay only. Additional earnings or payments are processed through the Additional Earnings Request process. Changes to base pay require documentation in order to process the request. A funding source field is located at the bottom of the form and must be completed for all compensation changes.

**Position Title Change**

- **Position Title Change**

  - Enter Proposed Position Title as it is to appear in Directory

  - Check reason(s) for this request.
  - [ ] Significant change to on-going responsibilities
    - Required: Attach a word document of the current job description with track changes to show the additional or change in responsibilities.
  - [ ] Other

Supervisors request a title change of a position using this action. If there has been a significant change to responsibilities, documentation is required in order to process the request.

**Supervisor Change**

- **Supervisor Change**

  - New Supervisor

  - [ ] Ongoing
  - [ ] Temporary

  - Briefly explain reason(s) for the change and expected duration.

Supervisors request a change in the employee’s direct supervisor by using this action and select whether this request is on-going basis or temporary. If temporary, please list the duration for the temporary request and to whom the position will report-to after the transition period.

**FTE / Work Schedule Change**
Supervisors request a change to an employee’s FTE change and/or work schedule using this action. If the request is for an FTE adjustment, a new work schedule is required. Please use the attachment feature to submit the new work schedule. Supervisors can see the employee’s current work schedule by clicking the similarly named hyperlink (please note: you may need to turn off pop-up blockers).

If the supervisor is submitting a work schedule change only, please only check the Work Schedule Change checkbox and attach the new schedule to the form.

**Additional Appointment**

Supervisors request to add or remove an employee’s additional, non-paid, appointment by using this action. This option is most widely used for directory listing purposes.

**Department Change**

Supervisors request to change an employee’s department/department funding by using this action. A department lookup is provided.
Either department number or the department description can be entered in this search field.

**Termination**

Supervisors use the termination action to notify that an employee is ending their employment with the University. When filling out the vacation payout amount, supervisors need to ensure their employee has reported all of their past paid time off and account for any future time that may be taken or accrued. The requested effective date of this change should be the day after the last day worked.

**Attachments**

Some of the actions selected in the form require additional documentation to be attached prior to submitting. Some examples are job descriptions, detailed work schedules, or justification for FTE increases.

To attach a document to the request:

1. Click the attachment icon
2. Click the **Add** button
3. Browse for the appropriate file

4. Click Upload

The file can now be viewed by clicking the **View** button. If a document(s) need to be removed, supervisors can remove the file by clicking **Delete**.

**Comments Box**

Supervisors may provide additional comments regarding the change(s) selected. The comments area may also be used to communicate information to the supervisors in the **Send Back** (see **Workflow**) function. Comments should be relevant to the change and will be submitted to the employee file.
**Action Buttons**

When submitting a request, there are three action buttons at the bottom of the page.

- **Save for Later** – Saves the current data on the form and issues a Request ID number. You can use this ID to Find an Existing Form for later processing.
- **Save & Submit** – Saves the form and initiates the approval workflow.
- **Delete** – Completely removes the request from the database. Once a form has been submitted, it can not be deleted.

**Form Status**

After submitting the form, the supervisor can view the form status either on the search panel (see *Locate Existing Forms*) or at the top of the request form.

The **Form Statuses** are:
- **Draft** – The form has not yet been submitted for approval
- **In Workflow** – The form is in the process of being approved (see *Workflow Statuses*)
- **Approved** – The form has completed the approval workflow process
- **Completed** -- The changes have been made to the database. At this time, the supervisors will be notified of the approval and completion of the request.

**Workflow**

All requests go through an approval workflow process. Supervisors can track and view where a form is in the workflow process. To view workflow status on the form, click the workflow status.

The **Workflow Statuses** are:
- **Pending** – The form is awaiting approval.
- **Sent Back** – The form has been sent back to the supervisor for additional or missing information. Upon providing the additional or missing information, supervisors can re-submit the form.
- **Approved** – The request has been approved by all parties.
- **Not Approved** – This status is a hard stop. The request will no longer be reviewed.