

Rolling out...



Forms and Processes Changes



WESTERN MICHIGAN UNIVERSITY

February 2013

Presentation Outline

- The following will be discussed:
 - Why changes to forms and processes
 - What forms are affected by changes
 - Available resources



Why Changes to Forms and Processes

- Business need to streamline forms process:
 - Need to process Staff and Faculty Appointment forms as paperless via electronic process
 - Efficient and timely method for form routing and signatures
 - Program currently used for printing Position Authorization, Appointment, and Transaction forms will no longer be available in the near future
 - Time to revise/update forms and to remove/include requested data



What Forms Affected

- Position Authorization
- Appointment forms
 - Faculty & Staff
 - (Currently using the new paperless electronic process for Staff Appointments)
- Transaction forms
 - Faculty, Staff & Temp
- Leaves of Absence forms
 - Faculty & Staff



Position Authorization (PA)

- Area requests PA from Budget designee
- Budget designee sends PA via e-mail to Area
- Area prints off PA, makes changes and forwards form for signatures



Changes to Faculty & Staff Appointment Forms

- Appointment forms
 - Both are paperless and follow an electronic process
 - Forms are completed by HR
 - All approvals, including pay rate, are finalized before form is processed



Faculty Appointment New Process

- Appointment forms
 - Faculty
 - PA form still required to post and fill position
 - Follow same online applicant process
 - Dean's Office follows same hiring process & sends hiring packet to Provost Office
 - *New electronic process begins:*
 - Hiring packet sent electronically from Provost to HR
 - HR creates and completes the electronic Faculty Appointment form and forwards to Budget for review
 - Budget reviews and confirms Faculty Appointment form
 - HR enters the form into PeopleSoft
 - HR sends by email an attached PDF copy of the Faculty Appointment form for record keeping purposes to hiring department, Dean's Office, Provost, Office of Institutional Equity, Budget and Payroll and Disbursements



Staff Appointment Current Process

- Appointment forms
 - Staff (currently using the electronic form process)
 - PA form still required to post and fill position
 - Follow same online applicant tracking process
 - HR sends hiring department hiring packet (draft of offer letter, and if required, background check information, etc.)
 - Hiring department contacts selected candidate for hire and gives verbal offer of employment, offer letter, etc.
 - HR conducts background check (if required) and sends results to hiring department to establish start date
 - *New electronic process begins:*
 - HR completes the electronic Staff Appointment form
 - HR enters the Staff Appointment form into PeopleSoft and sends by email an attached PDF copy of the Staff Appointment form for record keeping purposes to hiring department, Dean's Office, Office of Institutional Equity, Budget, VP/designee, Grants (if a fund 25-30), and Payroll and Disbursements



Changes to Transaction Form

- Forms no longer auto-generated and sent to departments when changes occur on employee record
- Department requests form on an “as needed” basis
 - Send request via email to HR-HRIS and include:
 - Employee name, employee ID, position number (regular employees) and GL Combo Code.
 - Transaction form will be sent to the requestor via email. Department prints, completes, and routes for signature approval.
- Pay change option for Staff job reclassification removed from form
- Leaves of Absence Action removed from form



Changes to Staff Job Reclassification

- Pay change option for staff job reclassification removed from form
 - Pay change submission resulting from changes to a staff Job Reclassification (JRC) will no longer require action on the Staff Transaction form
 - Pay changes resulting from a staff JRC will be processed by the evaluation results memo
 - Once job evaluation is completed, supervisor will receive from HR the memo with the evaluation results and HR's pay recommendation.
 - Supervisor returns memo to HR indicating the approval of evaluation and authorized pay (pay rates outside of HR's recommendation must have VP approval prior to results being processed).



Changes to LOA Form

- The Leaves of Absence Application form that employees currently complete have been revised and is the only required document to begin the LOA process
 - The LOA application will also be used as the data entry document. No Transaction form needs to be processed
 - All leaves must have a begin and end date. Extensions to existing leaves will also need to be done on the LOA application
 - Staff LOA forms located on the HR Forms page (Leave of absence section)
<http://www.wmich.edu/hr/forms.html>
 - Faculty LOA forms located on GoWMU at Academic Affairs Channel in the Academic Affairs Manual



LOA Forms

- Staff: Two applications – one for non-bargaining staff and one for bargaining unit staff. Employee completes and submits application to immediate supervisor for review and signature. Supervisor forwards form to next signature level. HR confirms leave eligibility and enters LOA.
- Faculty: Employee completes and submits application to Chairperson/Director for review and signature. Form is forwarded to Dean, then the Provost for review and approval. HR enters approved LOA.



Resources

- Management Data Report
 - Accessible through PeopleSoft; you must be an authorized user
 - Contains job information for all active jobs in a department, or by department within college or executive area
 - www.wmich.edu/hr/reporting.html
- Pay Earnings Report – Budget Office
 - Accessible through PeopleSoft; you must be an authorized user
 - www.budget.wmich.edu
- HR Rep
 - www.wmich.edu/hr/representatives.html
- HR home page to access HR Forms page
 - www.wmich.edu/hr



Life is a Highway

- Although we've made every effort to ensure a smooth transition, we anticipate there may be a few bumps in the road. We thank you in advance for your patience and understanding should you experience one of those bumps. Should any issues arise, we want to resolve them as quickly as possible.



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Q & A



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