WCUPA Classification and Request to Hire Form
Training Guide for Form Submitters
Office of Budget and Financial Planning
Updated January 15, 2025

The Classification and Request to Hire Form workflow is now being automated via the Visual Form Builder and Workflow Automation software Nintex.

Access to submit forms is limited to Divisional Budget Managers, Divisional Budget Associates, Assistant Deans for Budget and Personnel, or their designees. If you feel that you should have access to submit Classification and Request to Hire Forms, please contact your Divisional Budget Manager. They will then communicate with the Office of Budget and Financial Planning.

Division	Divisional Budget Manager
President	Glenda Hellmig
Academic Affairs	Mary Pat Werley
Finance and Administration	Melissa Wrightstone
Student Affairs	Christy Lanshe
Information Services and Technology	Mary Pat Werley
University Affairs	Brendon Gannon
Advancement and External Affairs	Brendon Gannon
Executive Vice President	Glenda Hellmig
Access, Compliance, and Engagement	Brendon Gannon

Section 1: Supporting Documentation

Job Description – all Classification and Request to Hire Forms must now be accompanied by an up-to-date job description. If you are filling a vacancy and nothing about the position duties are changing, please upload the most recent job description available. Only .doc, .docx, and .pdf files are permitted.

Section 1A: Classification Action

Selection of a Classification Action is required for all forms. Additional form fields will become visible depending on the selection made. ***Standard Vacancies do not require a Classification Action.*** Existing Position Classification Actions include In-Grade, Upgrade, Downgrade, and Market Equity Increase. If New Position Classification, Existing Position Classification, or Coach CBA Article 10 Provisions is selected, the form will be routed to the Office of Labor Relations.

New Position Classification

Requested Bargaining Unit *	Requested Classification *	Effective Date *
Please select ▾	Please select ▾	🗓

Select the Requested Bargaining Unit and Requested Classification from the drop-down menus. Select an effective date using the calendar feature. As a reminder, effective dates should be the beginning of a pay period (the Saturday immediately following a pay date).

Existing Position Classification

Existing Position Classification Actions *

○ In-Grade   ○ Upgrade   ○ Downgrade   ○ Market Equity Adjustment

Current Bargaining Unit *	Current Classification *
Please select ▾	Please select ▾

Requested Bargaining Unit *	Requested Classification *
Please select ▾	Please select ▾

Effective Date *	Amount or Percent
🗓	

Select an existing position classification option. Select the Current Bargaining Unit, Current Classification, Requested Bargaining Unit, and Requested Classification from the drop-down menus. Select an effective date using the calendar feature. As a reminder, effective dates should be the beginning of a pay period (the Saturday immediately following a pay date). If In-Grade or Market Equity Adjustment is selected, please include a percentage or new annual 26.08 salary amount in the Amount or Percent field.

Coach CBA Article 10 Provisions

Coach CBA Article 10 Provisions *

☐ Section 6 - Exceptional Performance Increase

☐ Section 6 - Exceptional Performance Lump Sum

☐ Section 7 - Coaches Pay Equity Increase

Effective Date	Amount
🗓	

Additional Comments

Select one or more Coach CBA Article 10 provisions. If the action is an Exceptional Performance Increase and/or a Coaches Pay Equity Increase, select an effective date using the calendar feature. As a reminder, effective dates should be the beginning of a pay period (the Saturday immediately following a pay date). Please include a percentage or new annual 26.08 salary amount in the Amount field.

Section 1B: Position Action

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1.B: Position Action

Check One *
○ New Position      ○ Fill a Vacant Position      ○ Incumbent

Position Recruitment *
○ None    ○ Standard    ○ WCU Internal Only    ○ PASSHE Internal Only    ○ Agency with Prior VP Approval

Position Type *                                  Employee Type *
○ Authorized (permanent)                         ○ Permanent (benefits eligible)

○ Not Authorized (temporary)                     ○ Temporary (not benefits eligible)


☐ FTE Change on Position
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Check One:

- New Position – select this for any new authorized or unauthorized position.

- Fill a Vacant Position – select this for any existing authorized or unauthorized position that is vacant and requires an action to be filled.

- Incumbent – select this for all In-Grades, Upgrades, Downgrades, Market Equity Adjustments, Temporary Hire Extensions, and Annuitant Rehire Extensions. This should also be selected for FTE Changes on Positions that are filled and do not require any other action.

Position Recruitment:

- None – this should only be selected if Incumbent is selected in the field above.

- Standard – this should be selected in most cases – it is a standard WCUPA Human Resources search.

- WCU Internal Only – this should only be selected if you have had a discussion with the Divisional Vice President and HR. Please upload a completed Internal Search Approval form at the top of the form.

- PASSHE Internal Only – this should only be selected if you have had a discussion with the Divisional Vice President and HR. Please upload a completed Internal Search Approval form at the top of the form.

- Agency with Prior VP Approval - this should only be selected if you have had a discussion with the Divisional Vice President and HR.

Position and Employee Type:

- Authorized positions are permanent, base-budgeted positions. Not Authorized positions are temporary and are not base-budgeted.
- Permanent Employees are benefits eligible. Temporary Employees are noy benefits eligible. Please reach out to WCUPA Human Resources with questions about benefits eligibility.

FTE Change on a Position: If you need to change the FTE of a position, check this box. Additional fields will become visible.

Section 1C: Position Details

1.C: Position Details

SAP Position Number *

Position Title *   Is this a change?
                                                             ⬤ No

Bargaining Unit *   Position Current Classification *
Please select ▼   Please select ▼

# of Hours per Pay Period   Work Schedule *   Work Location *   Remote Work Eligible?
*   08:00 - 16:30, M-F Please select ▼   Please select ▼
75

Supervisor *   Is this a change?
                                                             ⬤ No
Last Name, First Name

Leave & Time Approver *   Is this a change?
                                                             ⬤ No
Last Name, First Name

SAP Fund Center List *
Please select ▼

SAP Position Number, Position Title, Bargaining Unit, Position Current Classification, and SAP Fund Center can be found on PBM Broadcasts. If the intent of the form is to fill an Authorized Vacancy, this data will auto-populate.

Should you need to change the fund center of a position, please include this information in the Justification.

If you are changing the title from what appears on your PBM Broadcasts or auto populates, please use the Title Change toggle.

Hours per Pay Period: This field defaults to 75 hours per two-week pay period. Please be sure to change this if the position holder is to work 80 hours per two week pay period or part time.

Work Schedule: This field defaults to 08:00 – 16:30, M-F. Please change of the work schedule is different.

Work Location: Choose the correct Work Location from the drop-down menu.

Remote Work Eligibility: Choose the correct Remote Work Eligibility from the drop-down menu. Please reach out to WCUPA Human Resources with questions about eligibility.

Supervisor, Leave & Time Approver: Please enter the position's Supervisor and Leave & Time Approver in the appropriate fields using the Last Name, First Name format requested. Supervisor and Leave & Time Approver are not always the same individual. Please reach out to WCUPA Human Resources with questions about a position's Supervisor and Leave & Time Approver. If you are changing the Supervisor or Leave & Time Approver, please use the appropriate toggle.

Section 1D: Employee Details

Authorized Positions

1.D: Employee Details

Check if applicable *

● N/A (if new position)

○ Current (or Last) Employee in the Position

○ Direct Appointment

If this is a New Authorized Position Position, please select N/A (unless it is also Direct Appointment of an employee into a New Position). No further information will be required.

1.D: Employee Details

Check if applicable *

○ N/A (if new position)

● Current (or Last) Employee in the Position

○ Direct Appointment

Employee Name *

Employee SAP ID *

Last Name, First Name

Separation Date of previous employee

Last Employee Information

○ Employee moved to another position at WCU

○ Employee resigned or retired from WCU

If this is an Incumbent action or a Standard Authorized Vacancy, please select Current (or Last) Employee in the Position. Additional fields will become visible. If this is an Incumbent action, please fill in the Employee Information for the Incumbent. If it is a Standard Authorized Vacancy, please fill in the Employee Information for the Last Holder of the position.

1.D: Employee Details

Check if applicable *

○ N/A (if new position)

○ Current (or Last) Employee in the Position

● Direct Appointment

Employee Name *

Employee SAP ID

☐ Was this person a student?

Last Name, First Name

Start Date *

If this is a Direct Appointment, please Direct Appointment. Additional fields will become visible. Please fill in the Employee Information for the Direct Appointee.

Not Authorized Positions

1.D: Employee Details

Check if applicable *

○ Temporary Hire

○ Temporary Hire - Known Employee

○ Temporary Hire Extension

○ Temporary Rehire

○ Annuitant Rehire

○ Annuitant Rehire Extension

○ Limited Term Appointment

Employee Name *

Employee SAP ID

Last Name, First Name

Start Date *

End Date *

If the position is Not Authorized, the above menu will be visible. Please select the correct hire type and provide the information requested. Not all fields shown above will be visible for every hire type. The former Emergency Hire option has been replaced with "Temporary Hire – Known Employee." As a reminder, Start Dates should be the beginning of a pay period (the Saturday immediately following a pay date) and End Dates should be the end of a pay period (a pay date) when possible.

Section 1E: Justification

1.E: Justification

Please provide justification for this action. *

Justification is the explanation supporting the action being requested (filling a vacancy, hiring a temp, classification request, etc.) and should demonstrate the value of the work performed by the position.

Please make every effort to provide a thorough and meaningful Justification. "This position is critical to the work of the department" ***does not*** suffice. Please include why the position is critical – what functions does the position perform and what are the outcomes if the position is left vacant. Please include funding information when appropriate.

Section 1F: Approvals Routing

1.F: Approvals Routing

Division *

| Please select ▾ |

Divisional Budget Associate

Divisional Budget Associate Email

Divisional Budget Manager

Divisional Budget Manager Email

Divisional Vice President

Divisional Vice President Email

Budget Office Representative

Budget Office Representative Email

Select the Division from the drop-down menu. This will complete a look up of the name and email address for the Divisional Budget Associate, Divisional Budget Manager, Divisional Vice President, and Budget Office Representative. ***Please do not move on until all routing fields have populated.*** Your Divisional Budget Associate or Manager will be able to route the form to the Dean, Director, or AVP as part of their review process.

Section 1G: Submitter Information

1.G: Submitter Information

| Friday, January 3, 2025 1:28:55 PM |

Save   Submit

Submitter Information will autofill with your name, date, and time.

You may print a pdf on the landing screen following form submission.

Draft Start Forms can be viewed and completed at the following link: https://wcupa.workflowcloud.com/dashboard/my.