

# West Chester University Classification/Request to Hire Staff Form (C/R2H) Non-Faculty

The Classification/Request to Hire Staff form (C/R2H) must be completed in order to post and hire all non-faculty positions and serves as both a classification and a budget approval process when creating or filling all non-faculty staff positions (both permanent and temporary). The purpose of the form is to document all position addition/change requests including position reclassifications and promotions, and any other position changes with budget impact.

Sections 1, 3 and 7 of the form can be completed directly on the excel template. Use the "Tab" key to move forward to each new field or Shift "Tab" to move backwards through the form fields. Note that the shaded boxes in sections 1 and 2 are drop down menus. Until we can implement electronic signatures, the signature lines in all sections currently require *actual* signatures.

C/R2H forms must follow the approval routing process detailed below.

## **Section 1: Position Information**

This section captures information associated with the action being requested and must be completed accurately by the Requestor/Supervisor of the department where the position is budgeted, or the form will be returned.

### A) Classification Action

Check the appropriate box indicating if the classification action being requested is for an existing position or for a new position. If no classification action is being requested, then proceed to step B under Section 1.

If the requested action is for an existing position, check the appropriate box to indicate whether the change is an In-Grade, Upgrade, or Downgrade request. Using the pull-down menus, select the current classification for the position and the requested classification that is being sought for the position.

### B) Position Action

- Check if the position is a new position or if filling a vacant position.
- Check if the position is permanent or temporary and indicate if a recruitment action will be required (i.e., posting of the position).
- If the position action is for the current employee in the position, check the Incumbent box.
- Check applicable items:  
Is the action for:
  - An Interim Appointment (or Extension of an Interim Appointment)? If checked, continue to B.1.
  - A Temporary Extension? If checked, continue to B.2.
  - An Emergency Hire? If checked, continue to B.2.
  - FTE Change on a Position? If checked, continue to B.3.

**B.1.** Check the appropriate box for the Interim Appointment being requested. Provide the name of the employee who will be serving in the interim role and provide dates (beginning and ending) for the interim assignment. Please note, an interim appointment refers to an existing employee assigned 100% to fill a vacant position (this is different from someone taking on additional duties which would be addressed with out-of-class pay).

**B.2.** Check the appropriate box(es) for the temporary position action being requested. For temporary hires, provide both the start date and the end date of the assignment as well as the CMS Temp Comp # for the position.

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**B.3.** Check if requesting an FTE change on a position and provide the change in FTE/TWC being requested. (Note: TWC stands for Time Work Code and is a PeopleSoft field that references the "utilization" of the position.)

C) Position Details

Provide the details associated with the position:

- **SAP Position #:** Enter the eight-digit SAP position number of the position being processed. For "NEW" position requests (permanent or temporary), please leave **blank**; the new number will be assigned by Human Resources.
- **CMS Comp #:** Enter the five-digit CMS complement number of the position. This number can be found on the PBM personnel reports distributed to the authorized users. For "NEW" position requests, or if unknown, please leave **blank** and the number will be input by the Budget Office during the review process.
- **Position Title:** Enter the title of the position (example – Director XXXXX, Budget Manager, etc.). Please check the box next to the space provided for the position title if the request involves a title change for the position.
- **Bargaining Unit:** Select the appropriate position bargaining unit from the drop-down list in the shaded box. Note: "OTHER" refers to a non-bargaining unit wage employee (example, Co-op Intern).
- **Position Classification:** Select the appropriate classification for the position as it currently exists, from the drop-down menu (in the shaded box). Please note, the list is in bargaining unit order.
- **# of Hours Per Pay Period:** Enter the number of hours per pay period that an employee will work (i.e., usually 75 for permanent staff positions).
- **Work Schedule:** Enter the hours/day worked and the days/week worked (example, 0800-1630, M-F).
- **Work Location:** Select the employee's work location from the drop-down menu in the shaded box.
- **Supervisor and Leave/Time Approver:** Enter the current or new Supervisor and Leave/Time Approver.
- **Department:** Provide the department the position resides or will reside in.
- **Fund Center:** Select from the drop-down menu in the shaded box where the position should be charged.

For Payroll Purposes, please check the appropriate box:

- N/A (if the action is for a new position)
- Student to Staff Hire (if hiring a student into a permanent or temporary position)
- Current (if the action is for the current employee in the position)
- Rehire (if the action is to rehire a previously separated employee)

For all selections (except for "N/A"), please provide the employee name, employee number, and the separation date of the previous employee in the spaces provided.

**Once all information in Section 1 has been completed and the request is for a classification action (change or new), please route the form and any attachments to the Office of Employee & Labor Relations (Section 2) by scanning and emailing to: [LaborRelations@wcupa.edu](mailto:LaborRelations@wcupa.edu).**

**If the personnel action is not a classification request, then Section 2 should be skipped and submitted to the Divisional Budget Officer (Section 3) for review and completion.**

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**Section 2: Office of Employee & Labor Relations**

This section is for the Office of Employee & Labor Relations to recommend or deny classification requests. Employee & Labor Relations should complete the following:

- **Current Classification:** Select the position's current classification from the drop-down menu in the shaded box.
- **New Classification Recommendation:** Select the position's recommended classification upon completion of the Labor & Employee Relations review.
- **Classification Recommendation:** Indicate "Approve" or "Deny" by checking the appropriate box.

If any comments are warranted by the Office of Employee & Labor Relations staff, please use the Comments box provided (not required).

Once Employee & Labor Relations has concluded their review and provided their recommendation, the name of the person conducting the review should be provided in the "Name" field, along with their telephone extension; then proceed to sign/date the form before routing back to the requestor for the next step in the process.

**Section 3: Division Budget Review/Funding Information**

Once the form has been routed to the Divisional Budget Officer, the following information will need be filled in:

- **From: SAP Position # or Pool #** – Provide the 8-digit SAP position# or pool position# that is the source of funding for the R2H request.
- **To: SAP Position # or Pool #** – Provide the 8-digit SAP position # to be funded. If the position is a new FTE request, please leave this box blank.
- **Salary \$ Amount** – Provide the estimated salary dollar value of the position or request an estimate from the Budget Office. Used to gauge budget availability.
- **Benefits \$ Amount** – Provide the estimated benefit value for the position or request an estimate from the Budget Office. Used to gauge budget availability.

Note: Final salary & benefit amounts for new FTE will be determined once the position has been filled.

- **Budget Manager Approval/Date** - This signature is required for all submissions.

**Section 4: Administrative Review**

This section is required for all requests and is dependent upon the approved authorized level of decentralization for personnel budgeting within a division.

For New Positions, check one of the following boxes:

- ❖ Funded specifically in New Base Request (Critical Needs)
- ❖ Revision to Approved Critical Needs Request – If request is different from the manner originally approved, please attach a document outlining the change or use the comments box in section 7.
- ❖ Other – If the request is outside of the Critical Needs process, please attach supporting documentation that describes the reason for the request.

Requests must be signed/dated by both the Dean/Director/AVP and Vice President that has oversight over the position. Once this section is completed, the form is ready to be routed to the Budget Office.

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## Section 5: Budget Office Action

The Budget Office will review sections 1-4 and then will forward the approved form to the next step based on the Routing for Signature Authority.

## Section 6: Administrative Approval

The Budget Office will route all forms that are requesting new positions, upgrades, and repurposing of existing positions to the Executive Vice President for approval and signatures.

- Executive Vice President – This signature is required for all new permanent FTE, upgrade requests, and repurposing of any existing positions.
- President – This signature is required for all new permanent FTE.

Once the form is signed, the EVP's office will forward to Human Resources and cc the Division and the Budget Office.

## Section 7: Comments

Please use this section to help clarify the intent of the submitted R2H form.

## Routing for Signature Authority

### R2H Form Routing Process

