**NOTE:** Any changes to process due to remote work should be documented in procedures.

**SECTION**: Human Resources

**SUBJECT**: Employment Hiring Process - - Change in Appointment (Including New Appointments) Process Documentation

**APPLIES** **TO**: All Regular Staff Members (Excludes Temporary Employees)

**NOTE: Changes for FY2025 are identified in red text.**

**Change in Appointment Process Overview**

The objective of the change in appointment process is to ensure the appointment contains the appropriate revised pay rate, level of effort, effort distribution and funding sources, end dates, employment status, etc.

**Change in Appointment Process**

|  |  |  |
| --- | --- | --- |
| **Activity** | **Responsibility** | **Reference/Comments** |
| If the position is a bargained-for position, refer to the appropriate contract for process activities. |  | For information on Unions and Contracts:  Union Contracts and Wage Schedules: <https://hr.umich.edu/working-u-m/my-employment/union-contracts-wage-schedules>  Academic Contracts: <https://hr.umich.edu/working-u-m/my-employment/academic-human-resources/contracts> |
| If the position is a Regent approved position, refer to the Regents Bylaws and Regents Communication Manual for process activities. |  | Board of Regents Bylaws can be found at: <http://www.regents.umich.edu/bylaws/>  Academic Personnel Regents Communication Manual can be found at: <http://www.hr.umich.edu/acadhr/manual/index.html> |
| Confirm Fair Labor Standards Act (FLSA) status with University Human Resources Compensation and Classification Office, where employee is currently non-exempt and changing to an exempt job classification. | [insert appropriate person/position] HR Officer, Department Manager | For more information on FLSA:  <https://hr.umich.edu/working-u-m/management-administration/compensation-classification/fair-labor-standards-act> |
| Determine appropriate Shortcode(s) and percentages of effort for the employee’s salary distribution for the Department Budget Earnings (DBE). | [insert appropriate person/position] HR Officer, Department Manager | [SPG 501.10, Policy on Effort Certification](http://www.spg.umich.edu/policy/501.10)  For detailed information on Effort Reporting, visit the website:  <http://finance.umich.edu/finops/payroll/faculty/effort>  See process documentation for Effort Certification Reporting Process. |
| Ensure online Remote Worker Agreements are kept on file for hybrid or mobile/remote work arrangements, if applicable. Review at least annually. | [insert appropriate person/position] (HR Officer, Administrative Assistant, Hiring Manager) | For more information, see:  <https://hr.umich.edu/working-u-m/management-administration/remote-employment-policies-agreements> |
| Complete appropriate fields pertaining to the items changing on the appointment (including salary redistributions **with** job data changes) via PAR Launchpad.  For salary redistributions **without** job data changes (i.e., no changes to job effort or base salary), create a DBE transaction via the DBE Workflow  Both can be found in [Wolverine Access](https://wolverineaccess.umich.edu/)/ Human Resource Management System Workforce Administration → Job Information → Personal Action Request (PAR) → Create PAR | [insert appropriate person/position] (HR Officer, Business Administrator, Administrative Assistant) | For instructions and information on how to use PAR Launchpad, login to [My LINC](https://its.umich.edu/enterprise/administrative-systems/training/my-linc-overview), and enter Personnel Action Request (PAR) User Resources in Search Box and select result. |
| Route PAR workflow transaction to appropriate approver(s).  Route transaction to appropriate person(s) to review/approve. | [insert appropriate person/position] (HR Officer, Dean, Director, Business Administrator) | Approval should be done by someone with higher level authority. Review HRRIS Job Aid knowledge article entitled [All Units Approved checkbox, When do I select the (Google-doc).](https://docs.google.com/document/d/19Vn4lU2IMZZL2rdOzoCsWH35a0TGeeyQYJXXH5d5qHo/edit?usp=sharing) |
| Documentation to support the types and reasons for appointment changes should follow the applicable SPG policy and procedures. | [insert appropriate person/position] (HR Officer, Dean, Director, Business Administrator, Administrative Assistant) | [SPG 201.30, Unpaid Leaves of Absence](http://spg.umich.edu/policy/201.30)  [SPG 201.30-3, Seasonal Leave of Absence](http://spg.umich.edu/policy/201.30-3). A Seasonal Leave of Absence Appointment must be prearranged with the employee and approved by the department head of the employing department. The procedure for placing employees on and return from a seasonal leave can be found at  <https://hr.umich.edu/working-u-m/my-employment/uhr-procedures/20130-3-seasonal-leave-absence-appointment>  [SPG 201.30-5, Federal Intergovernmental Personnel Agreements](http://www.spg.umich.edu/policy/201.30-5)  [SPG 201.34, New and Changed Positions](http://www.spg.umich.edu/policy/201.34). The procedure for changing an existing appointment can be found at  <https://hr.umich.edu/working-u-m/my-employment/uhr-procedures/20134-0-new-changed-positions>  [SPG 201.61, Transfer: Promotional, Lateral, and Demotional](http://www.spg.umich.edu/policy/201.61)  Salary increase may be done as part of [SPG 201.41, Performance Management](http://www.spg.umich.edu/policy/201.41). Procedures can be found in [My LINC](https://its.umich.edu/enterprise/administrative-systems/training/my-linc-overview). See “Performance Management – Quick Reference Guide” and “Performance Management Essentials for Supervisors”.  For Compensation SPGs and U-M Total Compensation Philosophy see: <http://hr.umich.edu/compclass>  [SPG 201.51, Remote Location Pay and Reimbursement of Dependent Relocation Costs](http://www.spg.umich.edu/policy/201.51)  [SPG 201.61-1, Temporary Promotion/Salary Adjustment](http://www.spg.umich.edu/policy/201.61-1)  [SPG 201.72 Reduction in Force](http://www.spg.umich.edu/policy/201.72). Department resources concerning Reduction in Force (RIF) Resources for Administrators can be accessed at [https://hr.umich.edu/working-u-m/management-administration/additional-resources-supervisors-managers/reduction-force-rif-resources-administrators](https://hr.umich.edu/working-u-m/management-administration/additional-resources-supervisors-managers/reduction-force-rif-resources-administrators%20%20)  In accordance with [SPG 201.83, Retirement](http://www.spg.umich.edu/policy/201.83), The University offers staff members the option of “phasing” into retirement by various combinations of partial appointments, partial annuities, and for eligible professorial staff a partial furlough. “Phased” retirement must have departmental approval. |
| If the change in appointment is related to the Merit process, units are encouraged to submit merit increases and lump sum recommendations via the electronic spreadsheet process. | [insert appropriate person/position] (Merit Department Group’s Primary and Secondary Contact) | Procedure related to the Annual Salary Program can be found in [My LINC](https://its.umich.edu/enterprise/administrative-systems/training/my-linc-overview). See “Pay Rate Change” and “Pay Rate Change Template Spreadsheet.”  For instructions and information on how to use PAR Launchpad, login to [My LINC](https://its.umich.edu/enterprise/administrative-systems/training/my-linc-overview), enter Pay Rate Change in Search Box, and select result. |
| Retroactive salary distribution changes must comply with effort reporting and transfer guidelines. | [insert appropriate person/position] (HR Officer, Business Administrator, Administrative Assistant) | [SPG 501.09, Policy on Retroactive Salary Distribution](http://www.spg.umich.edu/policy/501.09) Changes  Procedures on how to process a Retroactive Salary Transfer can be found on Sponsored Programs website at:  <http://www.finance.umich.edu/resource/retroactive-salary-transfers> |
| For temporary employee appointments qualifying as “Full-Time” under Employer Shared Responsibility (ESR) regulations, complete the ESR Eligibility Certification form and return to Human Resources at the start of the appointment to trigger an offer of health care coverage. |  | Form can be found at <https://teamdynamix.umich.edu/TDClient/40/Portal/Requests/ServiceDet?ID=2851>  For variable hour temporary employee appointments, Human Resources will track hours worked, and if indicated, trigger offer of health care coverage at end of measurement period. |
| Discuss all actual and potential conflicts of interest or commitment with candidate and any disclosures as necessary. | [insert appropriate person/position] (HR Officer, Administrative Assistant, Hiring Manager) | [SPG 201.65-1, Conflicts of Interest and Conflicts of Commitment](http://www.spg.umich.edu/policy/201.65-1)  Consult department’s policy [insert Local Policy]. |
| Ensure new hires have completed required training as appropriate, including within the first 60 days the on-line module "Cultivating a Culture of Respect: Sexual Harassment and Misconduct Awareness." | [insert appropriate person/position] (HR Officer, Administrative Assistant, Hiring Manager) | Check with HR Representative to track training or supervisors can track in [My LINC](https://its.umich.edu/enterprise/administrative-systems/training/my-linc-overview) – Team icon/Manager Dashboard |
| For Units out of scope for SSC, ensure change in appointment is processed correctly by comparing the gross pay register with the source documentation (i.e., Submittal Form).  For Units in scope for SSC, monitor management reports (Gross Pay Register, Payroll Yearly Trend, eNotification HR DEPT, and HR ORG) as applicable for valid approvers, reasonableness, and appropriateness. Reports can be found by going to [Find an Existing or Standard Report](https://hr.umich.edu/working-u-m/management-administration/hr-data-analytics-services/find-existing-or-standard-report) on the Human Resources website. | [insert appropriate person/position] (HR Officer, Business Administrator, Administrative Assistant) | Payroll Yearly Trend Report can be found under the MGMT REPORTS tab of M-Reports (go to [Wolverine Access](https://wolverineaccess.umich.edu/collection/all/faculty-staff-wolverine-access)/M-Reports) For HR Reports contact uhr-report-issues@umich.edu |

Other related information:

Key Contacts:

* Additional employment resources for departments can be found on the Talent Acquisition (formerly Recruiting and Employment) website at <https://hr.umich.edu/working-u-m/management-administration/talent-acquisition-formerly-recruiting-employment> and [My LINC](https://its.umich.edu/enterprise/administrative-systems/training/my-linc-overview) *eRecruit: User Resources*.
* Contact your HR Unit Liaison [insert name] for eRecruit access question.
* Contact HR Officer [insert HR Office or equivalent name] for any concerns.
* For University HR assistance contact University HR Rep.

Related Standard Practice Guides:

* In accordance with [SPG 201.65-0, Work Outside the University](http://www.spg.umich.edu/policy/201.65-0), University employees may be employed outside of the University, but the outside employment must not detract from the performance of the duties and responsibilities of the University position, nor may it create a conflict of interest.
* In accordance with [SPG 201.35, Non-Discrimination](http://www.spg.umich.edu/policy/201.35), the University, in its employment and human resource policies and practices, will not discriminate against any individual because of race, color, religion, creed, national origin or ancestry, age, marital status, sexual orientations, gender identity, gender expression, disability, special disabled veteran and Vietnam-era veteran status, and height or weight, except as allowed by the need for bona fide occupational qualifications. Reasonable accommodation will also be provided to persons with disabilities, to disabled veterans, and to accommodate religious practices.
* In accordance with [SPG 201.46, Personnel Records - Collection, Retention and Release](http://www.spg.umich.edu/policy/201.46), the collection, availability and disclosure of the contents of personnel files is governed by regulations established by the University and applicable laws. The Faculty and Staff Records Office, the Medical Center Staff Records Office and the custodian of personnel files or records in various departments, schools, colleges or other University offices are subject to these regulations.
* Refer to [SPG 604.01, Departmental Record Retention for Business and Financial Records](http://www.spg.umich.edu/policy/604.01), to determine the proper record retention period relating to the job posting process.
* In accordance with [SPG 201.53, Security Clearance](http://www.spg.umich.edu/policy/201.53), The University may require a security clearance of its staff members, as a condition of employment in certain positions. Such clearance may be necessary for incumbents or applicants for employment, if their work requires access to information classified by the Federal Government. The determination of need for security clearance for specific positions or projects will be mutually determined by the University and the responsible Government Agency.
* To ensure the proper internal controls are in place when paying faculty, staff and independent contractors, please refer to [SPG 518.01, Payroll Controls](http://www.spg.umich.edu/policy/518.01).
* In accordance with [SPG 201.43, Probationary Period](http://www.spg.umich.edu/policy/201.43), during the initial six months of regular employment, employees are considered probationary. There is no obligation to continue employment through the probationary period.
* In accordance with [SPG 201.23, Appointment of Relatives or Others with Close Personal or External Business Relationships; Procedures to Assure Equal Opportunity and to Avoid the Possibility Of Favoritism (Nepotism)](http://www.spg.umich.edu/policy/201.23), the basic criteria for appointment and promotion of all University staff shall be appropriate qualifications and performance. Relationship to another individual employed by the University shall constitute neither an advantage nor a deterrent to appointment by the University, provided the individual meets and fulfills the appropriate University appointment standards.

Record of Revisions:

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| --- | --- | --- | --- |
| **Date of Issue** | **Description of Change** | **Page(s) Affected** | **Approved By** |
| 8/1/2007 | Original template created | All | [insert name] |
| 11/20/2008 | Updated with SPG revisions and corrected links |  |  |
| 1/3/2012 | Updated for FY2012 Certification – references to new DBE Workflow functionality | 1,2 |  |
| 1/15/15 | Par Launchpad, new management reports, in scope for SSC vs out of scope | 1,2,4 |  |
| 1/18/16 | Updated links; ESR Eligibility; | 1,2,4 |  |
| 12/2016 | Added FLSA language (not new) | 1 |  |
| 11/2017 | Updated links | 2 & 4 |  |
| 11/2018 | Updated paths to instructions and information | 2 & 4 |  |
| 11/2019 | Added clarifying language, updated links and added ensure all new employees have taken required training. | 1,3,4,5 |  |
| 11/2020 | Added how to check on training - cultivating a culture of respect…, updated link, and added tableau dashboard link. | 4 |  |
| 12/2021 | Added note on Remote/Flexible Work Agreements | 2 |  |
| 12/2022 | Updated link and site name | 3, 4, 5 |  |
| 12/2023 | Link updated | 5 |  |
| 11/2024 | Updated for online remote worker | 2 |  |

Document Owner: [insert name], [insert title]

Administrative Owner: [insert name], [insert title]