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## PURPOSE

The EHE Financial Approval HR Action Request Form (HR Action Form) must be used to obtain all approvals outside of Workday for HR transactions with a financial impact, including all funding sources (e.g., cash, earnings, projects, grants, etc.). Since Workday approval workflows do not allow responsible parties to review full details of an HR request or confirm policy compliance, the college has determined that the HRA Form is required for the following transactions. This ensures due diligence, caution, and timely review and approval of HR requests with the necessary documentation.

### These Guidelines will provide:

- Instructions on how and what requires a DocuSign HR action request using our EHE HR Action Form
- Who to include in EHE HR Action approval form Process
- Requirements for HR transactions that are funded outside of EHE

### This process will be applied consistently with the university's following policies:

Policy 3.10, [Staff Compensation](#)

Policy 4.20, [Staff Employment](#)

Policy 6.10, [Scheduling Work and Overtime Compensation](#)

## DEFINITION

HR Transactions	New/backfill positions, Reclassifications, Supplemental Compensation, Overload, Overtime, Differential Pay, Additional Pay, FTE Change, Hiring above Target Range, Pay Increases for Additional permanent Significant Duties, Equity Increase.
<a href="#">EHE Financial Approval HR Action Request Form</a>	The DocuSign template that is to be used to obtain prior approval for the funding of the above listed HR request. <b><i>This forms approval does not guarantee final approval for an HR request to be processed.</i></b>

## PROCEDURE

Once it is determined that an HR transaction request needs to be processed, the first step—after consulting with your Department HR Consultant (HRC)—is to complete the HR Action Form via DocuSign. This will allow you to obtain all required financial approvals from the individuals responsible for reviewing and approving such requests within your department and college. Since not everyone has access to all documentation in Workday and we cannot attach documents for all requests, it is essential to track approvals and funding prior to processing to ensure compliance with all policies and procedures.

# EHE Financial HR Action Request Form Guidelines

This process applies to all HR requests with a financial impact for staff and students. The form is not required for Lecturer or Graduate Associate hiring requests but is required for all other HR requests with a financial impact. Faculty are not currently included in this process but may be included at a later date.

Managers are responsible for completing this form and providing the necessary information. If you are assigned a Manager Liaison (ML), they can submit the form on your behalf and route it to the appropriate individuals for funding approval prior to HR processing the request.

If funding is supported by a Grant and/or Project, the Principal Investigator (PI), if not the requesting manager, must be included in the approval process, along with the Office of Research, Innovation, and Collaboration.

If funding is provided outside of EHE but EHE HR is processing the HR request, no form is required; however, your EHE Cost Center Manager must be notified with detailed information. This information should be sent to your Department HR Consultant (HRC) via email to support the processing of the request.

## ROLES AND RESPONSIBILITIES

Role	Responsibilities
Manager	Meets with their Department HR Consultant (HRC) to identify and discuss the HR transaction that needs to be processed. Provides justification and details of the request to be included in the completion of the HR Action Form.
Department HR Consultant (HRC)	After providing the manager with detailed information and instructions on the necessary steps to complete the HR Action Form for the requested HR transaction, the HRC will provide the DocuSign link to initiate the process. The HRC is responsible for ensuring that all required information is provided and complies with policy and regulations. Once all approvals and information are received, a designated HR Specialist will process the request in Workday until it is successfully completed. For HR requests supported by outside funding, the HRC will notify the EHE Cost Center Manager with full details of the HR request, including funding work tags, prior to processing in Workday.
Manager/Manager Liaison (ML)	Can initiate the EHE HR Action Form, routing it to the required approval parties: Manager, HR Consultant, Cost Center Manager, PI, and Unit Leader.
Unit Leader	Reviews justification and details of the HR request for approval. If approval is denied, Unit Leader should take that action during this time by denying signing the EHE Financial HR Action Form and provide a reason in the comment section provided.
Cost Center Manager (CCM)	Reviews the request, justification, and budget appropriateness, and provides work tags to support the HR transaction. If financial approval is to be denied, the CCM should take action by not signing the HR Action Form and providing a reason in the comment section.
CAO/Dean	Reviews and approves all requests that impact college funding, including PBA, cash, and earnings. Approves overloads exceeding the normal 10%, FTE changes, and equity requests. Project/grant and outside funding do not require CAO/Dean approval.