



University of Pennsylvania Perelman School of Medicine

HR Action Financial Review Form

This form is a supplement to the standard Workday processes for human resource actions noted below. Please complete this form and attach to the appropriate Workday process.

All actions requiring this form should be sent to Nadene Kelley-Myers, as an AD-HOC approver from the Workday HR Partner.

Department/Center/Institute/Office: _____

Employee Name: _____ Position Title: _____

Action requested: Please check one and include the required documentation noted at the end of this form.

(Note: Requests for actions/approvals listed below must have Nadene Kelley-Myers as an **AD-HOC** approver from the Workday HR Partner or they will be sent back to the initiator.)

Review position for **Promotion**

New/Replacement Position

Job Change (Phased Retirement/Status Change)

Review salary for **Compensation Change**

Allowance Request

ANNUAL funding available to support **salary and EB** for the requested action: \$ _____

Funding Source(s)

% Funding	Funding Source Name	Cost Center	Penn Fund	Program	CREF
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Please Note: Requested HR actions for which funding cannot be verified will not be approved.

Please verify that all documentation required financial verification is in place prior to submitting this form.

- As part of the HR action review and approval process, PSOM Finance will verify the availability of funds for this action in the account(s) listed above. Please be certain that all transactions in the respective account(s) are up-to-date.
- If any portion of the funding is from a grant approaching its end date, please attach the award notification for future years.

Form Completion Contact Information

Person completing this form:

Name: _____ Phone Number: _____

Principal Investigator (Must be completed if position is funded by one or more grants)

Name: _____ Phone Number: _____



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REQUIRED DOCUMENTATION

In addition to the PSOM financial review form, a list of additional documents are required based on the specific action. Please submit as an attachment to the appropriate Workday processes.

PROMOTION REQUEST DOCUMENTATION (formerly reclassification):

- Memo providing reason for request, including an approximate amount of time that the incumbent has been performing the new duties
- A copy of the previous PIQ
- A current resume
- Organizational chart, including names of incumbents
- PSOM Financial Review Form

COMPENSATION CHANGE REQUEST DOCUMENTATION:

- Memo providing reason for request
- A copy of the current PIQ
- A current resume
- Organizational chart, including names of incumbents
- PSOM Financial Review Form
- Offer letter and competing job description (if applicable for retention)
- Prevailing wage concern only requires memo, financial review form and supporting DOL documentation
- Established career track (such as Lab Animal Tech certifications) only requires memo, financial review form and supporting career track documentation

CHANGE JOB REQUEST DOCUMENTATION: i.e. staff going PT to FT or Phased Retirement

- Memo providing reason for request
- A copy of the current PIQ
- A copy of the previous PIQ, if there has been a change in duties.
- A current resume, if there has been a change in duties.
- PSOM Financial Review Form if Part-Time to Full-Time
- For phased retirement, signed agreement per HR policy 414

ALLOWANCE - ACTING RATE REQUEST DOCUMENTATION:

- Memo providing reason for request, including the responsibilities that will be assumed, amount and requested term
- PSOM Financial Review Form