

## Change Form Completion Instructions

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### 1.0 Purpose

- 1.1 The purpose of this instruction guide is to define the steps required to effectively complete the Change Form to initiate temporary or ongoing changes to employees or positions within the University of Waterloo.

### 2.0 Scope

- 2.1 The Change Form is to be used for initiating temporary or ongoing changes to ongoing or fixed-term Staff, CUPE or students.
- 2.2 Changes to casual employee hourly rate or employment end date can be completed within Workday following the [Casual job change user guide](#). All faculty and non-faculty changes are completed on a revised appointment form.

**Reference [Employee Job Change Chart \(pdf\)](#) for employee change definitions and processing instructions for each job change type.**

### 3.0 Roles & Responsibilities

- 3.1 The Requester is responsible for:
- 3.1.1 Completing the Change Form in a timely and comprehensive manner, ensuring all required fields are completed and rationale provided.
  - 3.1.2 Obtaining the required approvals/signatures required for the requested change, such as:
    - Principal Investigator
    - Chair / Department Head
    - Office of Research
    - Employee
  - 3.1.3 Sending the required documentation to Human Resources in a timely manner by the payroll deadline (electronic or hard copy will be accepted)
- 3.2 Human Resources is responsible for:
- 3.2.1 Reviewing and validating the information captured on the Change Form. If information is missing or inaccurate, Human Resources will be responsible for contacting the requester and requesting the missing information.
- \*Please note:** *Missing or inaccurate information and/or approvals will affect the timely processing of the form and may result in payroll delays.*
- 3.2.2 Updating position and/or employee data in the Human Resources Management System (HRMS).

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### 4.0 Terms, Definitions and Instructions

The following table defines the fields in the Change Form and provides instructions for using and completing the form.

CHANGE REQUEST INFORMATION	
Term	Definition
Incumbent name:	Name of employee in role.
Position # of role to be changed:	Eight-digit identification number assigned to the position affected by this change.
Employee ID:	Six-digit employee identification number assigned to the incumbent.
Employee Type:	Select the appropriate Employee type from the drop-down menu as recorded on the landing page within Workday
Current Job title:	Enter the incumbents current job title as recorded on the landing page within Workday under the incumbent's name
EMPLOYEE DETAILS	
In this section, please fill out <b>only the details that are changing unless required field</b> . An <b>effective start date is required for all changes</b> , only indicate end date if the change request is temporary.	
Effective date of change	Select the effective date of the change you are requesting. <i>This field is required for all changes.</i>
Effective end date	Enter the effective end date of the appointment, for temporary/definite term only. Please request extensions longer than 3 months through Icims
Job title:	Enter incumbents job title
Reports to name:	Enter the full name of the supervisor.
Organization name	Enter the Organization Supervisory name.
Organization ID#	In Workday, click on incumbent's 'Supervisory' Organization name hyperlink. Enter the Organization ID: SUPORG followed by a 6-digit number
Location:	Indicate where the position will be located. Example East Campus 1
Salary (CDN \$)	Enter the current salary for the employee and the new salary if changing. <i>This field is required for all changes.</i>
Salary period	Enter the frequency of salary (hourly (CUPE), monthly, or annually) Please ensure you complete this field if research compliance is required
Hours per week:	Select the appropriate option from the drop-down menu. option. Must be either 35, 37.5, or 40 hours per week. Note: cannot be greater than the Scheduled hours per week
Scheduled hours per week:	Enter the number of hours scheduled per week. This determines the FTE of the employment for part time employees. Note: when changing scheduled hours, a new work schedule must be provided
CHANGE TO WORK SCHEDULE	
Complete this section for staff with part time or unique schedules. This schedule is used to calculate time off, stat holiday pay, vacation and overtime. All staff must have a work schedule in Workday. Please indicate the daily start and end time for the position. Days off should be left blank. <b>Please use 24 hr format for times.</b>	
SALARY ALLOCATION	

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Use this section if requesting a change to salary allocation or if research compliance is required	
Current cost center(s):	Provide current costing allocation details
Current % Distribution:	Percentage is required and must total 100%
Current Cost Centre owner name & Signature:	Name of cost center manager or signing authority/delegation required if not changing current cost center(s)
New cost center(s):	Provide new costing allocation details if change is required
New % Distribution:	If listing multiple cost centers, indicate the distribution percentage. Percentage is required and must total 100%
New Cost Centre owner name & Signature:	Name of cost center manager or signing authority/delegation required if not changing current cost center(s)
Allocation termination date	Enter date allocation will cease to be applied. At this point, the allocation will revert to the default cost center unless a new change form is provided
RATIONALE FOR CHANGE	
Rationale for change:	Use this field to identify additional details and provide any rationale. It is important to provide as much detail as possible for processing
APPROVALS AND AUTHORIZATIONS	
Please obtain and date all required approvals. Digital/electronic signatures will be accepted.	
Requester:	Required for all changes.
Employee:	Required for changes to salary and extensions
Chair / Department Head:	Required for all changes (if different from the requester).
Office of Research:	Required for research-funded roles
HR Partner:	Required for all staff changes

### 5.0 References

- 6.1 [University of Waterloo Payroll Deadlines](#)
- 6.2 [Employment Standards Act](#)
- 6.3 [Policy 54 – Definition of Staff](#)
- 6.4 [Collective agreement between the University of Waterloo and CUPE Local 793 \(PDF\)](#)

### 6.0 Revision History

Revision Level	Description of Change	Date	Approved By
0	Document creation	11/1/2018	HR Admin
1	Document update	12/6/2018	HR Partner
	Document update	05/12/2020	CM Advisor

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