

Promoting a Staff Member — Complete Checklist & Process

All documents and forms referenced within this checklist can be found within the [Hiring Manager and Supervisor Webpage](#) and [Staff Position Management Webpage](#).

Completed	Task Step
	Highly recommend reading the Staff Promotions guidelines and procedures document first. There are two effective dates for promotions and filing deadlines with each. (within the Staff Position Management page)
	The hiring manager will need to provide a detailed rationale defined in a memo/email along with organizational chart updates to Human Resources (HR)/Jessica Welch.
	The hiring manager will need to create a new classification description by following the detailed instructions next.
New Position Classification Description (aka Job Description)	
*Can be completed by the Hiring Manager/Supervisor or with the assistance of the HR Liaison.	
	Hiring Manager may complete the Google Doc outline (request from Jessica Welch) or the department's HR Liaison may assist with entering the information directly into PeopleAdmin (please do not move to approved).
	Share the completed classification with HR/Jessica Welch
	HR/Jessica Welch will use the information provided within the classification description to classify the position as exempt vs non-exempt (salaried or hourly) and then the career band.
	HR/Jessica Welch will review the rationale and classification and provide feedback.
	Once the classification process is complete, a New Position & Promotion Job Requisition Form will need to be completed. Instructions on how to complete this form are next.
New Position & Promotion Job Requisition Form	
	<p>Hiring manager will need the following information to complete the new position form</p> <ul style="list-style-type: none"> ● Department and title of the new position ● 6 digit org. number ● 4 digit account number <ul style="list-style-type: none"> ○ 5110 — Regular salaried position ○ 5120 — Term or temp salaried position

	<ul style="list-style-type: none"> ○ 5130 — Regular hourly position ○ 5140 — Term or temp hourly position ● Position specifics <ul style="list-style-type: none"> ○ Exemption status <ul style="list-style-type: none"> ■ Exempt/Non-exempt salaried ■ Non-exempt hourly ○ Career band and the associate pay range for the career band ○ Appointment type <ul style="list-style-type: none"> ■ Regular vs term ■ Full-time vs part-time ■ Full-year vs academic years vs other ● Budget implications
	Hiring manager will need to send for division head’s review, approval, and signature.
	After the division head has signed the form, the hiring manager will send the New Position Job Requisition form to HR/Jessica Welch.
	HR/Jessica Welch will review the New Position & Promotion Job Requisition form
	<p>HR/Jessica Welch will send the form for the Position Management Team’s review</p> <ul style="list-style-type: none"> ● Approved? <ul style="list-style-type: none"> ○ Yes: HR will proceed with below ○ No: HR/Jessica Welch will take the job requisition form back to the hiring manager and/or department/division head for discussion. Once the questions/concerns have been addressed the request will be sent back to the Position Management Team.
Once the job requisition form for the promotion has been approved	
	HR will proceed with the paperwork including a promotion letter to present to the staff member from the hiring manager.
	Confirm with HR the benefit eligibility of the position if any changes were made to the appointment status (yearly hours or term length).

Helpful contact information:

- Jessica Welch — ext. 3505 — jewelch@sewanee.edu
- Jacqueline Blair — ext. 1381 — jlblair@sewanee.edu