THE UNIVERSITY OF MEMPHIS®

Workforum Training
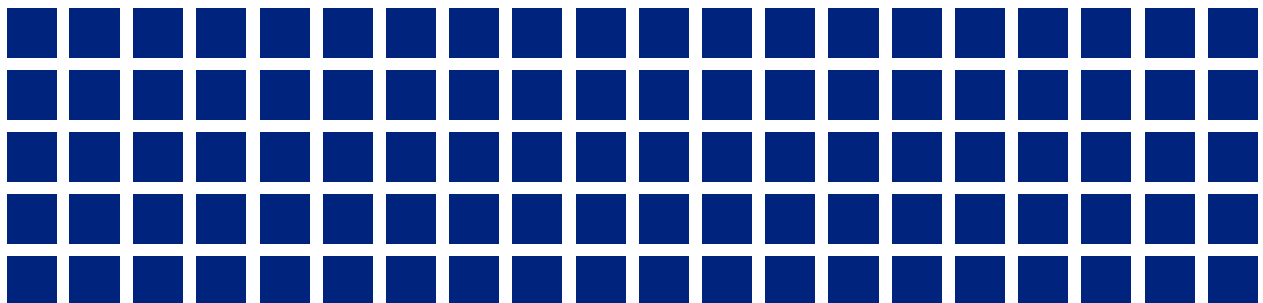## Part 7: Changing a Position's Supervisor

Table of Contents

Summary

The University offers a [Web site](#) from which departments can generate organizational charts on demand. Internet Explorer must be used to view these org charts, and a plugin may need to be installed the first time this site is accessed. The charts will pull information from the Banner system including position number, incumbent employee and job title. These organizational charts may be navigating both downwards and upwards, going all the way up to the president of the University.

In the event that an inaccuracy is found and/or reorganization occurs, University departments need a method to request changes to the structures displayed on these charts. These requests will be fielded via a Request to Change Supervisor action within Workforum.

Request to Change Supervisor Action

To begin completing a Request to Change Position Supervisor, you may wish to begin by verifying that you are logged in under the appropriate user type. In the upper-right of the Workforum screen, your current role is specified in a dropdown box at the top. If you need to change user type, select a different role from the dropdown box and click the refresh arrow. Please note that only Assistants, Department Authorities, and Human Resources can initiate these requests.

To start your Request to Change Position Supervisor, you will need to navigate to the Position Management module of the system. This module always features a header stripe image that is orange in color. In the far upper-left portion of the screen, choose **Positions** from the three dots in the corner. Selecting this option will reset the screen to the "orange side" of the system.
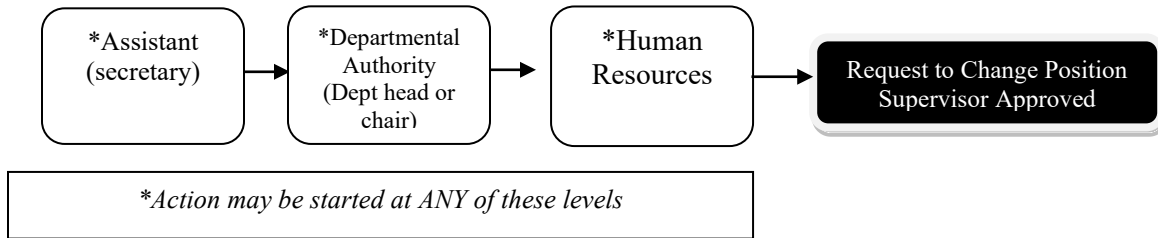
Across the top center menu, roll your mouse over the **Positions** tab. A fly-out menu will appear, and from this menu you will either select **Staff, Administrative Executive, & Contract Coaches** OR **Full-Time Faculty & Academic Executive**. Clicking either of those options will produce a search results list with all corresponding positions to which you have access. Locate the position whose supervisor you are interested in changing and click that position's title in the first column. (You need not click the checkbox.)

After selecting the position of your choice, the full position description on file is retrieved. You may review this description to ensure you have selected the appropriate position. In the upper-right section of the screen, you will see a list of available actions to take on this position. In this case, you would select the **Request to Change Position Supervisor** option. Doing so gives you a warning message that proceeding will lock this position to other actions until this action is completed. Acknowledge that message by clicking **Start**, and then you are in the body of the actual request.

You will see a series of read-only tabs related to the position and the employee. Proceed to the Supervisor tab and select the position that your choice will now report. Click **Next** to review, and then route to the next appropriate level.

All <u>regular</u> positions in Workforum, regardless of being faculty or staff, have requests to change their supervisory positions routed to Human Resources. Very few approvals are required, and each request will follow this simple workflow details below.

Request to Change Position Supervisor Workflow

```
┌─────────────┐     ┌─────────────┐     ┌─────────────┐     ┌─────────────────────────┐
│ *Assistant  │ →   │*Departmental│ →   │  *Human     │ →   │ Request to Change Position│
│ (secretary) │     │  Authority  │     │ Resources   │     │  Supervisor Approved      │
│             │     │(Dept head or│     │             │     │                           │
│             │     │   chair)    │     │             │     │                           │
└─────────────┘     └─────────────┘     └─────────────┘     └─────────────────────────┘
┌──────────────────────────────────────────────────┐
│      *Action may be started at ANY of these levels │
└──────────────────────────────────────────────────┘
```

Please keep in mind that the organizational chart [Web site](#) will reflect your change the day AFTER your request is approved and entered by Human Resources.

Additional Training

This concludes the training session on Requests to Fill. Further workForum training is available for the following topics.

- Introduction to the System
- Requesting to Fill Existing Positions
- Requesting to Create a New Position
- Requesting to Reclassify/Retitle an Existing Position
- Tracking, Reviewing, and Processing Applicant Pools
- Hiring an Applicant and Completing a Hiring Proposal
- Part-Time Faculty