# Justification to Advance Position, Online Form

Updated \\ November 7, 2024

## When To Submit the Form

The Justification to Advance Position Online Form is required in any of these situations:

- The position is subject to the position cap
- The unit attests the position's funding is gift, grant, or contract, however the fund is not on the position cap approved list of gift, grant or contract funds
- Is exempt from the position cap based on job responsibilities, however the standard job description is not on the position cap list of exempted SJDs

The form should be complete before you submit the TREMS job card to OHR for review. OHR will not release jobs requiring a justification form until the justification form is received and fully signed.
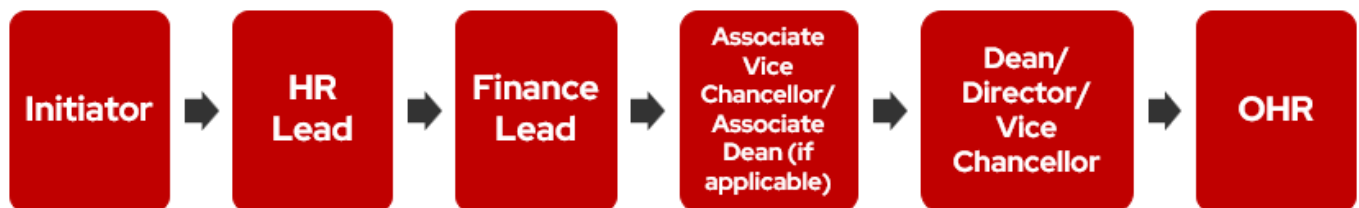
## Who Approves the Form

The form requires approval from all the following:

- Human Resources Lead
- Finance Lead
- Associate Vice Chancellor/Associate Dean (if applicable for your unit)
- Dean/Director/Vice Chancellor

## Process Overview



1. **Initiator starts the form, completes all sections, and submits.**
   - Only the initiator can edit the form.
2. **Form is routed to HR Lead for review**.
   - HR Lead receives an email with a link to the form.
   - If HR Lead started the form, they will also complete the next step to approve/deny it.
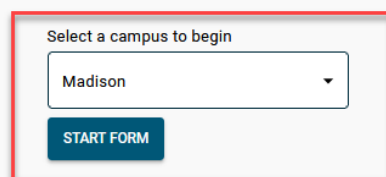
3. **HR Lead approves or denies the form.**
   - o If approved, the form is routed to the Finance Lead. Finance Lead receives an email with a link to the form to review.
4. **Finance Lead approves or denies the form.**
   - o If approved, the form can be routed to the Associate Vice Chancellor/Associate Dean or other approvers, if applicable.
   - o Form must be routed to the Dean/Director/Vice Chancellor for final approval before OHR review. Dean/Director/Vice Chancellor receives an email with a link to the form.
5. **Dean/Director/Vice Chancellor approves or denies the form.**
   - o Dean/Director/Vice Chancellor selects the check box for final review.
6. **Form is routed to OHR for final review.**
   - o OHR will reach out if there are questions or deny the form if expected signatures are incorrect. If denied, form will go to the initiator to correct and reroute for signatures.
7. **Initiator and all approvers receive an email that the form has been received by OHR.**
8. **Unit submits the job card in TREMS for Talent Acquisition to post the position. If the form is for a waiver, the unit may proceed with approving the PVL waiver in JEMS.**
9. **After OHR reviews the form, the initiator and all approvals will receive a confirmation email.** This email is for informational purposes only; no action is needed.

## Process Tips

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- Each approver routes the form to the next approver for review by entering their email on the form. Refer to the list of approval contacts for each unit, stored in the HR Reps Position Cap Box Folder.
- Dean/Director/Vice Chancellor may delegate approval to others. Talent Acquisition will need email documentation. Send email documentation to uwjobs@wisc.edu.
- Only the initiator who starts the form can edit the form. If edits are needed after the initiator has submitted the form, an approver will need to deny the form.
- School/College/Division HR can determine who is best to be the initiator. For example, the initiator could be the hiring unit or an HR Business Partner.
- If an approver denies the form, it is returned to the initiator. The form will be routed again to all approvers.

## Initiator: Steps to Start and Submit the Form

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1. Go to the Online Justification Form home page.
2. Select "Madison" as the campus. Click "Start Form."

Select a campus to begin

Madison ▾

START FORM

3. Complete all sections.

**Enter Division, Department, and contact information.**

## Section 1: Department and Contact Information

| Division: | Division Name * | Department Number (UDDS): | UDDS * | Department: | Department Name * |
|---|---|---|---|---|---|
| Hiring Manager Name: | Hiring Manager Name * | | HR Business Partner Name: | | HR Business Partner Name * |
| Hiring Manager Title: | Hiring Manager Title * | | HR Business Partner Title: | | HR Business Partner Title * |
| Hiring Manager Email: | Hiring Manager Email * ✉ | | HR Business Partner Email: | | HR Business Partner Email * ✉ |

**Use draft PVL to enter position details.**

**If request type is a replacement, complete "Prior Incumbents" field.**

## Section 2: Position Details

| PVL Number: | Position Number * | Request Type: | Request Type * ▾ | Appointment Type: | Appointment Type* |
|---|---|---|---|---|---|
| # of Positions requested for vacancy: | Num Positions Requested * | FTE %: | FTE Percent Range * | Recruitment Type: | Recruitment Type * |
| Job Code: | Job Code * | Official Title: | Official Title * | Business Title: | Business Title * |
| Prior Incumbent(s) & EMPLID{s}: | Prior Incumbents Names | Comments | Position Details Comments | | |

**Enter at least one funding source and distribution percent.**

## Section 3: Funding

| | | Funding String(s) | Distribution % |
|---|---|---|---|
| Funding String(s) and Distribution %(s) | | Funding Source1 * | Distribution Percent1 * |
| | | Funding Source2 | Distribution Percent2 |
| | | Funding Source3 | Distribution Percent3 |

## Section 4: Justification for Position

Question A is required for every position. If the position falls within the cap, complete questions C - E. If you are attesting the position should not be included in the cap, complete question B.

**Select Position Cap Definition.**

| A. Position Cap Definition | Position Cap Definition * ▾ |
|---|---|

**Add funding or responsibilities if position should be exempt from the cap.**

| B. If you believe this position should be exempt from the position cap due to job responsibilities and or funding, please provide your justification. | Exempt Justification |
|---|---|

**Complete if position falls within the cap.**

| C. Which critical functions or responsibilities will not be completed if this position is not filled? | Critical Functions |
|---|---|
| D. Describe efforts taken to streamline and automate internal unit processes to avoid need for additional FTE(s) (i.e. simplifying tasks, automating repetitive actions, leveraging existing technology, prioritizing projects). | Efforts Taken |
| E. If filling this position results in an increase in overall FTE, describe how you will manage the position cap through December 2026. | Manage Position Cap |

**Optional: Add comments.**

| F. Comments | Justification Comments |
|---|---|

**Enter email of HR Lead. If HR Lead started the form, they enter their own email. Submit.**

## Section 5: Approval Routing (*mandatory)

By typing your name into this form, you attest to reviewing the title, position description, associated job duties, funding sources, reporting structure and justification for hire and you approve the advancement of this position.

| Route to HR Lead | Email to route form to * ✉ |
|---|---|

[ SUBMIT ]

# Approvers: Steps for Approval Routing

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1. Click on the link to the form in the email notification.
2. Approve the form or deny it back to the initiator.
3. Enter the next approver. Refer to the list of approval contacts for each unit, stored in the [HR Reps Position Cap Box Folder](#).

**Section 5: Approval Routing (*mandatory)**

By typing your name into this form, you attest to reviewing the title, position description, associated job duties, funding sources, reporting structure and justification for hire and you approve the advancement of this position.

| Enter your name. Approve or deny. | Title: | HR Lead | Type Your Name as Your Signature | Signature * | Do you approve or deny this form? | Required * <br> ◯ Approved <br> ◯ Denied |
|---|---|---|---|---|---|---|
| If denying, comment is required. | Leave comments if you are denying the form | | | | | |

| Enter email of next approver. Submit. | Next Routing Title | Finance Lead | Next Routing Email: | Email ✉ |
|---|---|---|---|---|
| | SUBMIT | | | |

**Finance Lead** may enter additional approvers (such as Associate Vice Chancellor or Associate Dean), if applicable, or the Dean/Director/Vice Chancellor.

| Finance Lead enters additional approvers or Dean/Director/Vice Chancellor. | Next Routing Title | Title | Next Routing Email: | Email ✉ |
|---|---|---|---|---|
| | SUBMIT | | | |

**Dean/Director/Vice Chancellor** must check the box "Route to HR for final approval."

| Check box to route to OHR. Submit. | ☑ Route to HR for final approval (Otherwise fill out the following information to who to route the form to next) |
|---|---|
| | SUBMIT |

**OHR** reviews the form. Process is completed.