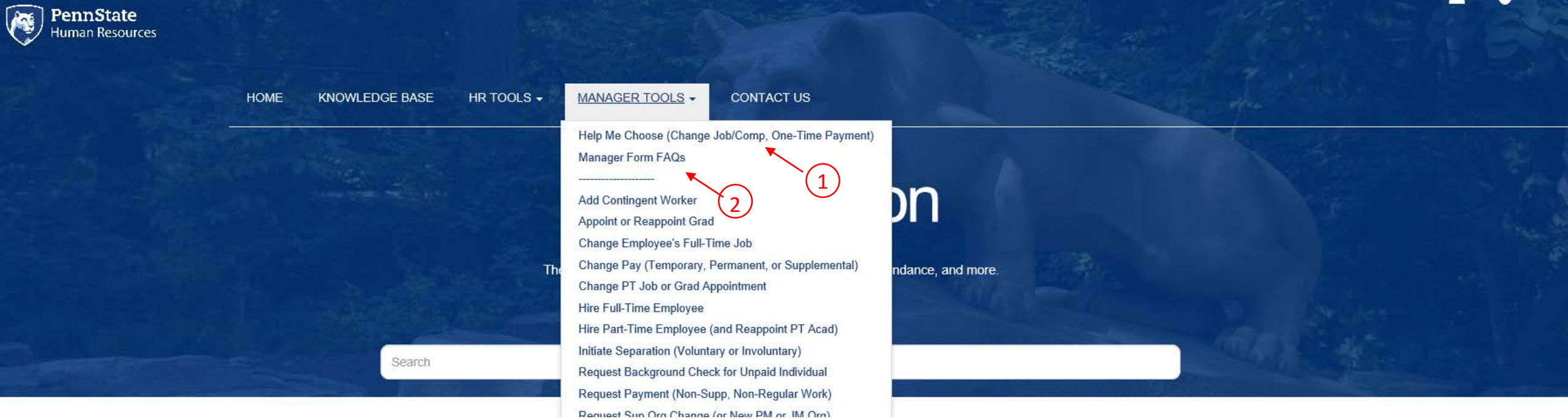


Two New Tools to Help you Select the Correct Manager Form



1. **Help Me Choose** – Provides the option of using a decision tree or a guided questionnaire to select the correct manager form.

*Note: This is only to be used for a **change in job, change in compensation, providing supplemental pay, or one-time payment.***

2. **Manager Form FAQs** – Provides frequently asked questions about all manager forms.

Use the decision tree to choose between the change job, change compensation, provide supplemental pay, or one-time payment forms.

HELP ME CHOOSE (CHANGE JOB/COMP, ONE-TIME PAYMENT)

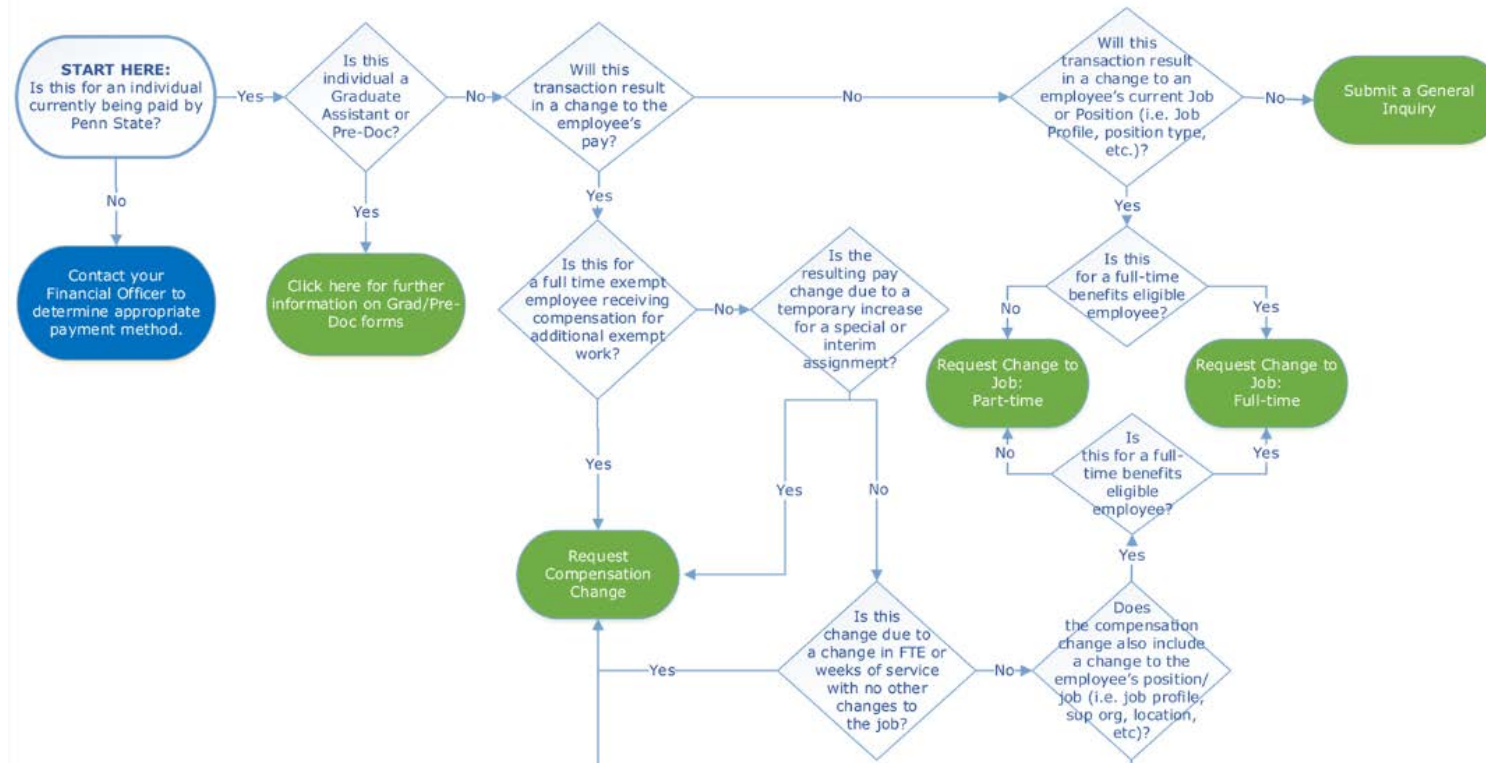
Use one of the two options below for assistance in selecting the correct Manager Form to be used for:

- Changing job details
- Compensation changes
- Supplemental compensation
- Initiation of one-time payments

Option 1: Guided questions - Respond to a series of questions, resulting in the recommended Manager Form.

Option 2: Decision tree - In the decision tree below, each green end point may be selected, resulting in the requested Manager Form or page.

Additional information on Manager Forms can be found under the [WorkLion Manager Tools](#) topic in the Knowledge Base.



Alternatively, use the guided questions to help select the correct form.

Guided Questions

HOME KNOWLEDGE BASE HR TOOLS ▾ MANAGER TOOLS ▾ CONTACT US

Help me choose a Manager Form (Change job/comp, one-time payment) - Guided Questions

The below guided process will assist in the selection of a Manager Form for requests related to changing job details, compensation changes, providing supplemental compensation, or one-time payments. Respond to each question with and then select "Next". Select "Previous" to return to a previous page to change responses. After completion, a link to the appropriate Manager Form will be provided.

Additional information on Manager Forms can be found under the [WorkLion Manager Tools](#) topic in the Knowledge Base.

Is this for an individual currently being paid by Penn State?

 Yes
 No

Answer a series of Yes or No Questions.

Next

HOME KNOWLEDGE BASE HR TOOLS ▾ MANAGER TOOLS ▾ CONTACT US

Help me choose a Manager Form (Change job/comp, one-time payment) - Guided Questions

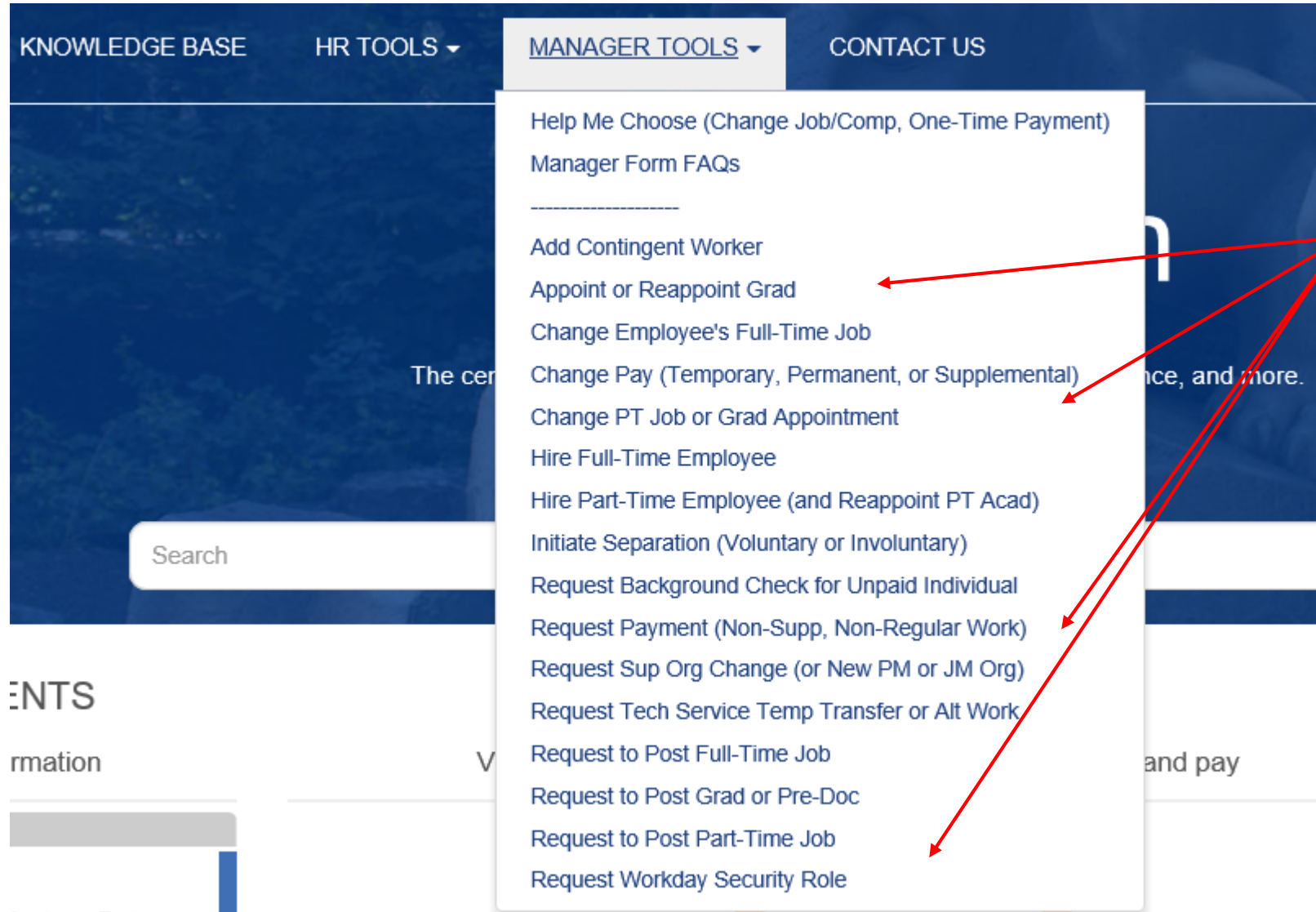
The below guided process will assist in the selection of a Manager Form for requests related to changing job details, compensation changes, providing supplemental compensation, or one-time payments. Respond to each question with and then select "Next." Select "Previous" to return to a previous page to change responses. After completion, a link to the appropriate Manager Form will be provided.

Additional information on Manager Forms can be found under the [WorkLion Manager Tools](#) topic in the Knowledge Base.

[Please click here to Request Compensation Change.](#)

When you are finished, a link to the appropriate form will be provided.

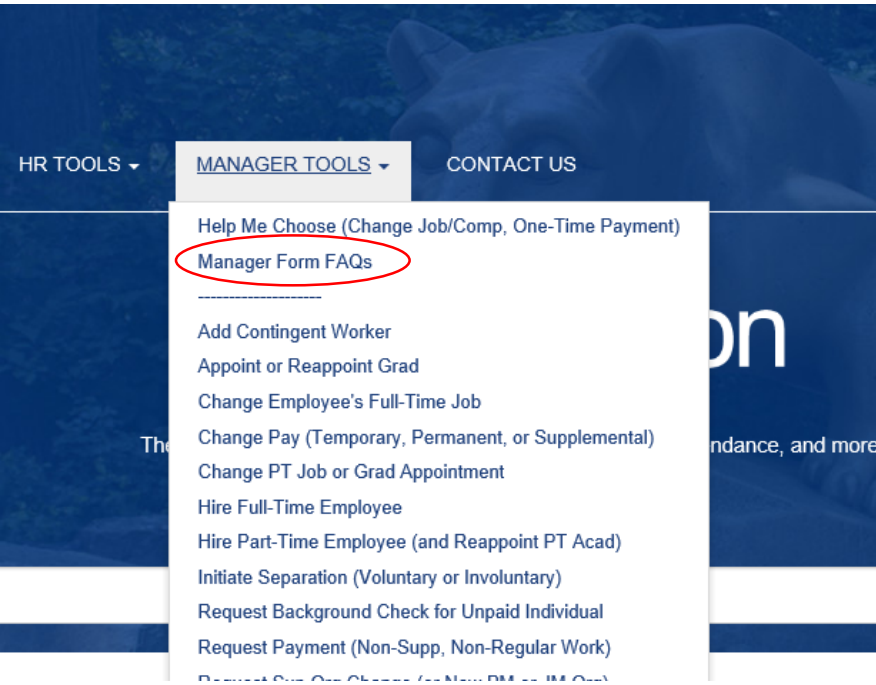
New Manager Form Names



In addition to the new manager tools, we've also changed the names of some of our manager forms to help make them more intuitive.

Manager Form FAQs

The manager form FAQs provide answers to questions about all of the manager forms.



Manager Form FAQs

Manager Form FAQs

How do I know which form to use?

In the WorkLion Knowledge Base there is a category called "WorkLion Manager Tools." Within this category are a variety of articles, including decision trees for form selection, form instructions for every form, and other helpful resources.

[I do not have the Manager Tools menu in the WorkLion.psu.edu portal, but I'm expected to submit forms for my manager.](#)

The Manager Tools menu is provided to individuals who have been given the "Neocase Manager Proxy" role in Workday. To request this access for you, your manager will need to complete a Workday Security Role Request form.

[Will other Manager form proxies or managers be able to view forms I create via the WorkLion Portal?](#)

No, an individual's My Inquiries in the WorkLion portal only shows the inquiries submitted by that person.

[I complete a lot of forms for different managers in my department. Is there a way to keep these separate?](#)

To make tracking inquiries such as these easier, the list of open inquiries can be viewed by using the "Manager Forms" tab in "My Inquiries." To view this way, go to your "In Progress" inquiries and then click on the "Manager Forms" tab. This view shows the manager name, making it easier to differentiate the inquiries when supporting multiple managers.

In addition, you can export the list of open inquiries by clicking on the Excel "Export" symbol in the bottom right of your Inquiries in Progress list view.

[I receive an error when submitting a Manager Form.](#)

It has been determined that opening a new tab of WorkLion to access Workday causes an issue with the authentication of the first instance, but it isn't obvious until submitted the form and receiving the red bar error. To prevent this from occurring, open Workday in a separate tab or browser before you select and begin your form. If already working on a form, you can open Workday by selecting the "Workday" link in the descriptive text at the top of the form.

[How do I save my form?](#)

Unfortunately, a Manager Form cannot be saved and must be completed in one session; however, depending on your browser's internet settings, there are typically auto-complete settings that remember data previously entered in webforms.

[I am hiring an individual to do a few hours of work for us, but they already have another part-time position at Penn State. Do I need to complete a form?](#)

Yes, an Initiate a Hire – Part-time form should be submitted so that the Add Job can be completed for that individual. Any paid work needs to be added as a job so that the appropriate pay and details can be applied to the additional position, even if only a few hours.