

OVERLAPPING INCUMBENT FORM

Purpose

This form is to be used by managers to communicate business need and retain fiscal approval for the temporary overlap of two FT employees in a single position (complement).

Overview

In some cases it is beneficial to overlap incumbents for purposes of knowledge transfer and consistency of workflow. For example, overlap may be beneficial prior to an employee retiring. Managers are required to discuss and receive approval for the overlap of incumbents with their Senior Dean/Director (their signature is required under the Administrative Approval section below). The current incumbent must already have a termination date identified. A FOAP must be provided to cover the increased salary cost. If the incumbents will overlap in a position for more than 3 months, a discussion with and approval from Finance is required. The contact person from Finance is Hanh Do, Associate Director, Financial Planning.

Position Title: <input type="text"/>
Position Number: <input type="text"/>
Incumbent Being Replaced: <input type="text"/>
Date of the Request (dd-mmm-yyyy): <input type="text"/>
Date Current Incumbent Vacates Position: <input type="text"/>
Overlap Reason: <input type="text"/>
FOAP: <input type="text"/>
Overlap Period: <input type="checkbox"/> 3 months <input type="checkbox"/> More than 3 months <input type="text"/> <input type="text"/>
<p style="text-align: center;">Start Date End Date</p>

Hiring Manager Approval

Name

Signature

Date

Administrative Approval

Name

Signature

Date

Finance Approval (if required)

Name

Signature

Date