
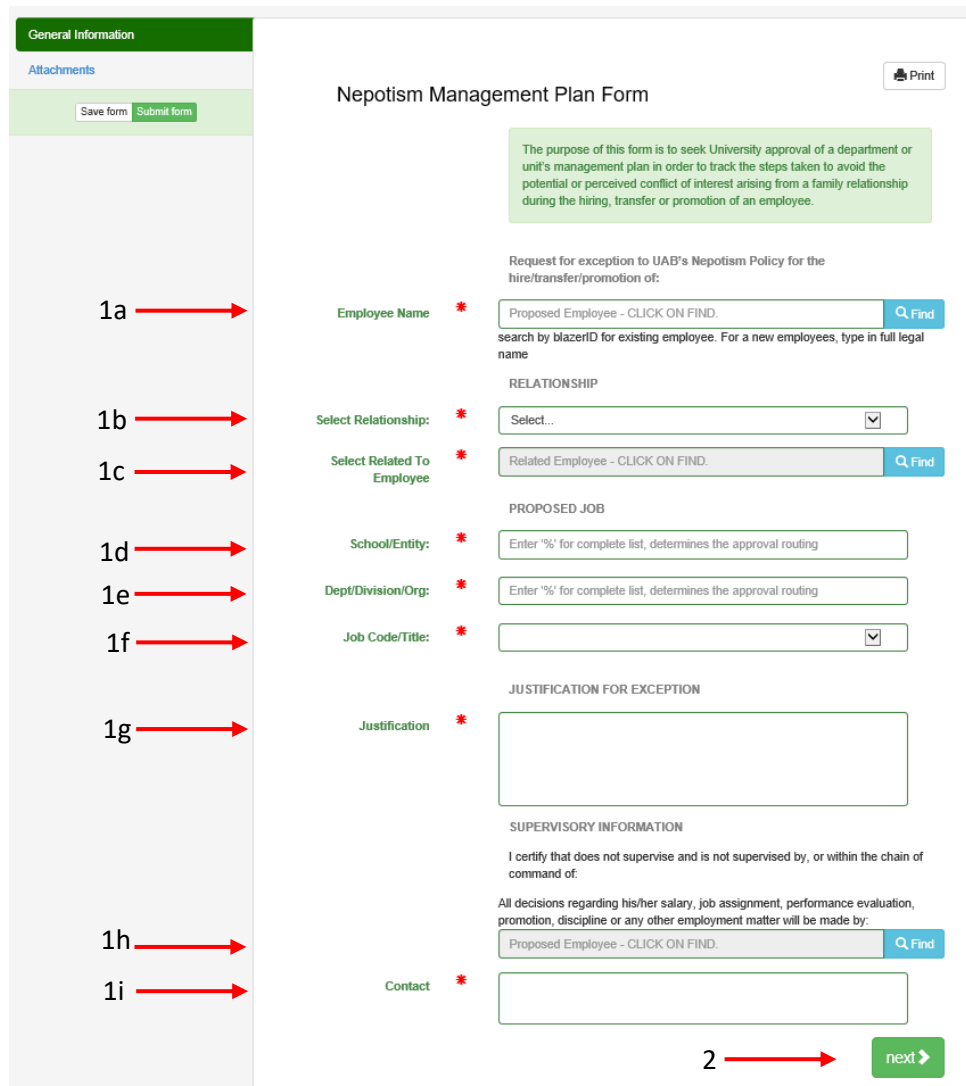


# Nepotism Management Plan Form - User Guide

## How to Submit a Nepotism Management Plan Form for Approval

### To submit a Nepotism Management Plan Form for approval:

1. Complete all required fields (\*).
  - a. **Employee Name** field is the employee/candidate the department or unit needs to hire, promote or transfer.
  - b. **Select Relationship** field is the family relationship between the person being hired, promoted or transferred and the current employee within the department.
  - c. **Select Related To Employee** field is the current UAB employee already assigned within your department or unit.
  - d. Select your **specific school or entity**.
  - e. Select your **specific department division or organization**.  
*(\*Tip: If the School/Entity is the School of Medicine, please type the name of the Dept/Division/Org instead of using the % wildcard search. Doing so will speed up the app's processing time.)*
  - f. Select the available **job code/title** to be filled within the department or unit.
  - g. Provide justification for exception to support your need to hire, promote or transfer this employee within your department/unit.
  - h. Use the Find icon to locate the person who will be the hired, promoted or transferred employee's supervisor.
  - i. Enter **contact** information for the hiring manager or other leadership who may require additional follow up regarding this request.
2. Click the  button at the bottom of the form to go to the Attachments and Approvers screen.




The screenshot shows the 'Nepotism Management Plan Form' interface. On the left, a vertical sidebar contains a list of annotations: '1a' through '1i' with red arrows pointing to specific fields, and '2' with a red arrow pointing to the 'next' button at the bottom right. The form itself has a green header with 'General Information' and 'Attachments' tabs. Below the tabs are 'Save form' and 'Submit form' buttons. The main content area is titled 'Nepotism Management Plan Form' and includes a 'Print' icon. A green box explains the form's purpose: 'The purpose of this form is to seek University approval of a department or unit's management plan in order to track the steps taken to avoid the potential or perceived conflict of interest arising from a family relationship during the hiring, transfer or promotion of an employee.' Below this, it asks for a 'Request for exception to UAB's Nepotism Policy for the hire/transfer/promotion of:' and lists several required fields: 'Employee Name' (with a 'Find' button), 'Select Relationship' (dropdown), 'Select Related To Employee' (with a 'Find' button), 'School/Entity' (text input), 'Dept/Division/Org' (text input), and 'Job Code/Title' (dropdown). A 'JUSTIFICATION FOR EXCEPTION' section contains a large text area. Below that is 'SUPERVISORY INFORMATION' with a text input for the supervisor's name and a 'Find' button. At the bottom, there is a 'Contact' field and a 'next' button.

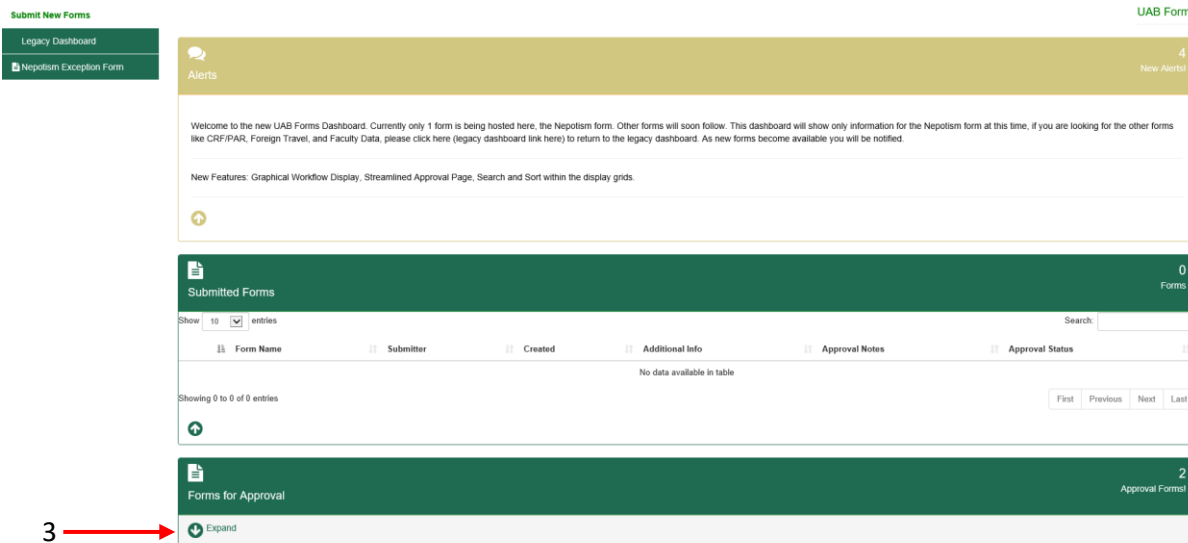
3. If you have any attachments such as an org chart or department memo to support your request, click the Upload Attachment button to add it to your request.
4. If additional approvers need to be added for review and approval of this request, click the Find icon and locate the employee in the directory. Click **Add Approver** if more approvers are needed.
5. Click **prev** if you need to go back to the previous screen to edit/add or change any information. Click **Submit** to submit your request for approval.

The screenshot shows a web form titled "Attachment and Approvers" with a sidebar on the left. The sidebar contains "General Information" and "Attachments" (highlighted in green). Below "Attachments" are "Save form" and "Submit form" buttons. The main content area has a "Print" button in the top right. Under "Attachments:", there is a green box with instructions: "Please attach supporting documentation such as departmental memos and/or an organizational chart which explains or diagrams the department or unit structure and where each related employee is positioned within the department (See example.)". Below this is a red arrow labeled "3" pointing to an "Upload Attachment" button. Under "Uploaded Attachments", there is a text prompt: "This should not be your Blazerid. Please enter the Blazerid of additional approvers that are not already in this workflow." Below this is a red arrow labeled "4" pointing to the "Additional Approver:" section, which includes a text input field with the placeholder "Additional Approver's Blazerid - Click Find", a "Find" button, and an "Add Approver" button. At the bottom, there are two red arrows labeled "5": one pointing left from the "Submit" button to the "prev" button, and another pointing right from the "prev" button to the "Submit" button.

# How to Review and Approve a Nepotism Management Plan Form

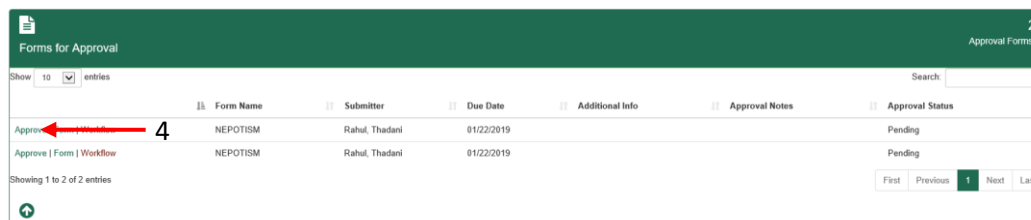
## To review a Nepotism Management Plan Form requiring approval:

1. Locate the email in your inbox from [UABForm@uab.edu](mailto:UABForm@uab.edu) titled “**Request for Nepotism Management Submitted By... -Approval Requested**” and click on the link “**Click here to review the Form.**”
2. Log in using your Blazer ID and strong password.
3. On the UAB Forms Dashboard, locate the **Forms for Approval** section and click the **Expand icon**  to view the forms awaiting your approval.  
(\*Tip: The number in the right corner of this section tells you how many approval forms are waiting)



The screenshot shows the UAB Forms Dashboard. On the left, there are navigation links: 'Submit New Forms', 'Legacy Dashboard', and 'Nepotism Exception Form'. The main content area has a green header 'UAB Forms' with a 'New Alert!' notification and a count of '4'. Below this is an 'Alerts' section with a welcome message and new features. The 'Submitted Forms' section shows '0 Forms' and a table with columns: Form Name, Submitter, Created, Additional Info, Approval Notes, and Approval Status. The 'Forms for Approval' section shows '2 Approval Forms' and an 'Expand' button. A red arrow labeled '3' points to the 'Expand' button.

4. Once a list of the forms awaiting approval appears, you will have the option to Approve the form, view the form details and/or view the workflow details. Click the Approve option.



The screenshot shows the 'Forms for Approval' table. The table has columns: Form Name, Submitter, Due Date, Additional Info, Approval Notes, and Approval Status. There are two rows of data. The first row has 'Approve' button, 'NEPOTISM', 'Rahul, Thadani', '01/22/2019', and 'Pending'. A red arrow labeled '4' points to the 'Approve' button. The second row has 'Approve | Form | Workflow', 'NEPOTISM', 'Rahul, Thadani', '01/22/2019', and 'Pending'. The table shows 'Showing 1 to 2 of 2 entries' and navigation buttons: First, Previous, 1, Next, Last.

5. On the Approval Screen click the View Form button to review the Management Plan Form request.  
(\*Note, you will be required to log in with your blazer ID and password to the Management Plan Form to view the form details.)
6. Select your Approval Type to Approve, Cancel, Reject or Return to Requestor.
7. Add Comments as needed
8. Check the Certify box stating you certify you have reviewed the form.
9. Add Additional Approvers as needed.  
(\*Note this would be approvers not already included in the workflow displayed at the bottom.)

9. Click the Submit button.

Approval Screen

The screenshot shows an approval interface with the following components and callouts:

- 5:** Points to the "View Form" button at the top left.
- 6:** Points to the "Approval Type" dropdown menu.
- 7:** Points to the "Comments" text area.
- 8:** Points to the "I certify I have reviewed this form" checkbox.
- 9:** Points to the "Add Approver" button in the "Additional Approvers" section.
- 10:** Points to the "Submit" button at the bottom left.

**Form Information**

Form Type	MEPOTISM
Form	View the Form
Additional Info	
Created Date	1/22/2019

**Requestor Information**

Submitted By	Thadani, Rashid
Submitted For	
Email	rthadani@uab.edu
Department	114300000 HR&I Data Systems

**Approval History**

Approved By	Approval Level	Approval Date	Approval Type

**Workflow History**

DOC#

```
graph LR; Start((Start)) --> L1[Level 1  
Status: Approved 01/22/2019  
by Tumimala, Ramya]; L1 --> L2[Level 2  
Status: Pending]; L2 --> L3[Level 3  
Status: Pending];
```