

# **CRESTWOOD UNIVERSITY**

Office of Human Resources

## **Standard Operating Procedure**

*Human Resources Operations*

Effective Date: February 3, 2026

Prepared by: Nicole Ashford, Director of Human Resources

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## 1. Overview

The purpose of this document is to outline the Human Resources operational procedures for the Office of Human Resources at Crestwood University. This SOP covers the end-to-end processes for employee onboarding, offboarding, leave management, performance management, and recruiting.

Do not deviate from the procedures described in this document. If a situation arises that is not covered, escalate to the HR Director immediately by posting a notification in Slack [OUT OF SCOPE] – [email subject line].

The HR Coordinator's role is administrative and digital – process cases using email, Slack, calendar, Jira, and the reference spreadsheets and document templates listed in Section 6. Physical tasks — such as conducting in-person orientation sessions, collecting physical documents, or issuing badges — are performed by the hiring manager or the employee's supervisor. This role is to coordinate, track, and ensure compliance deadlines are met.

## 2. University Description

Crestwood University is a private university with approximately 1,400 employees, including full-time staff, part-time staff, and faculty, across three campuses in Colorado (Main Campus in Ridgefield, West Campus in Lakewood, and the Downtown Center in Denver). The university employs approximately 620 full-time staff, 280 part-time staff, and 500 faculty members. Crestwood operates on

a fiscal year of July 1 through June 30 and an academic calendar of fall and spring semesters with a summer session.

**HR Support Email:** [hr@crestwood.edu](mailto:hr@crestwood.edu)

**HR Escalation Email:** [hr-escalations@crestwood.edu](mailto:hr-escalations@crestwood.edu)

**HR Phone:** (555) 814-2200, option 2

**HR Office Hours:** Monday–Friday, 8:00am–5:00pm. Closed on university-observed holidays (see Section 10).

### 3. Definitions & Vocabulary

The following terms are used throughout this SOP. All staff must be familiar with these definitions before processing any HR case.

|       |                                                                                                                                                 |
|-------|-------------------------------------------------------------------------------------------------------------------------------------------------|
|       |                                                                                                                                                 |
| FMLA  | Family and Medical Leave Act. Federal law entitling eligible employees to up to 12 weeks of unpaid, job-protected leave per year.               |
| ADA   | Americans with Disabilities Act. Federal law requiring employers to provide reasonable accommodations to qualified employees with disabilities. |
| COBRA | Consolidated Omnibus Budget Reconciliation Act. Federal law requiring employers to offer continuation of group health                           |

|                     |                                                                                                                                                       |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
|                     | coverage after a qualifying event.                                                                                                                    |
| PIP                 | Performance Improvement Plan. A formal, documented plan to address and correct employee performance deficiencies.                                     |
| I-9                 | Employment Eligibility Verification form. Federal form required within 3 business days of an employee's first day of work.                            |
| PTO                 | Paid Time Off. Combined vacation and personal leave accrued by eligible employees.                                                                    |
| Qualifying Event    | A life event (marriage, birth, divorce, loss of other coverage) that triggers eligibility for mid-year benefits enrollment changes or COBRA coverage. |
| Exempt Employee     | An employee exempt from overtime provisions of the Fair Labor Standards Act (FLSA), typically salaried.                                               |
| Non-Exempt Employee | An employee entitled to overtime pay under the FLSA, typically hourly.                                                                                |
| Probationary Period | The first 90 calendar days of employment for staff, or the first academic year for faculty.                                                           |

|                            |                                                                                                                      |
|----------------------------|----------------------------------------------------------------------------------------------------------------------|
| Supervisor of Record       | The direct supervisor listed in employee_roster.xlsx for a given employee.                                           |
| Benefits Enrollment Window | The first 30 calendar days from an employee's start date during which the employee must enroll in or waive benefits. |

### 3.1 Dates & Times

All times in this document are Mountain Standard Time (MST, UTC-7) or Mountain Daylight Time (MDT, UTC-6). Always use MM/DD/YYYY format when entering dates in any system field or correspondence. When logging timestamps in tracking spreadsheets, use the format MM/DD/YYYY HH:MMam/pm.

### 3.2 Employee Email Addresses

All employee internal email addresses follow the format [first initial].[last name]@crestwood.edu (e.g., John Smith = j.smith@crestwood.edu). This address is provisioned by the IT Access Coordinator upon onboarding and is recorded in the "Email" column of employee\_roster.xlsx. When sending email to an employee, always look up their address in employee\_roster.xlsx. For new hires who have not yet been provisioned, use their personal email address (provided in the new hire notification).

## 4. HR Team & Contacts

|                                   |                     |                           |
|-----------------------------------|---------------------|---------------------------|
|                                   |                     |                           |
| Vice President of Human Resources | Dr. James Whitfield | j.whitfield@crestwood.edu |
| HR Director                       | Nicole Ashford      | n.ashford@crestwood.edu   |
| Benefits & Leave Manager          | Patricia Huang      | p.huang@crestwood.edu     |
| Recruiting & Talent Manager       | Derek Okonkwo       | d.okonkwo@crestwood.edu   |
| Employee Relations Specialist     | Marta Voss          | m.voss@crestwood.edu      |
| Payroll Liaison                   | Calvin Briggs       | c.briggs@crestwood.edu    |
| IT Access Coordinator             | Jenna Park          | j.park@crestwood.edu      |

## 5. Internal Communication – Slack Channels

All operational HR communications must use designated Slack channels. Do not use direct messages for case-related communication.

|                    |                                                                                                                                   |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------|
|                    |                                                                                                                                   |
| #hr-onboarding     | New hire processing, I-9 tracking, benefits enrollment reminders, orientation scheduling.                                         |
| #hr-offboarding    | Resignations, terminations, COBRA notifications, final pay, access revocation.                                                    |
| #hr-leave-requests | FMLA requests, ADA accommodations, PTO disputes, return to-work issues.                                                           |
| #hr-performance    | PIP initiation, evaluation cycle questions, disciplinary actions.                                                                 |
| #hr-recruiting     | Requisition approvals, candidate screening updates, offer status, background checks.                                              |
| #hr-escalations    | Issues requiring HR Director or VP attention — legal threats, compliance deadlines, unresolved cases older than 10 business days. |
| #hr-general        | Non-case-specific questions, policy clarifications, team announcements.                                                           |

## 6. Reference Files & Systems

The following files and systems are used to verify all employee and case information. Do not quote any information from memory — always verify from the relevant source before taking action.

|                      |                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                  |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
|                      |                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                  |
| employee_roster.xlsx | All active employees: name, employee ID, email address, department, campus, supervisor, hire date, classification (exempt/non exempt), employment status (full-time/part-time/faculty), hours worked in trailing 12 months, status (Onboarding / Active / Separated), last day of work, separation type, notes. Employees work from the office unless noted here as WFH. | Every triage step; verifying employee identity and status; confirming supervisor of record; FMLA hours worked eligibility check. |

|                           |                                                                                                                                                                                                     |                                                                                                                                                       |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| benefits_enrollment.xlsx  | Current benefits elections, enrollment dates, dependent information, waiver records, COBRA notification dates.                                                                                      | Onboarding benefits enrollment; offboarding COBRA eligibility; qualifying life events.                                                                |
| leave_tracker.xlsx        | FMLA eligibility data (hire date, hours worked), current PTO balances (read-only — do not calculate), PTO accrual rate per pay period, approved/pending leave requests, ADA accommodations on file. | All leave requests; FMLA eligibility checks; PTO balance inquiries (read the balance from the 'Current PTO Balance' column); return-to-work tracking. |
| performance_log.xlsx      | Evaluation history, PIP records (with PIP end dates), disciplinary actions, rating history by employee.                                                                                             | PIP initiation; evaluation scheduling; progressive discipline verification.                                                                           |
| recruiting_tracker.xlsx   | Open requisitions, posting status, candidate pipeline, interview dates, offer status, background check results.                                                                                     | All recruiting actions; requisition approvals; candidate status updates.                                                                              |
| onboarding_checklist.xlsx | Per-employee onboarding task list: I-9 tracking, benefits enrollment, orientation, IT setup.                                                                                                        | Tracking onboarding completion; identifying overdue items.                                                                                            |
| Calendar – HR Events      | Orientation dates, evaluation deadlines, benefits enrollment deadlines, interview schedules, PIP review dates, FMLA certification deadlines.                                                        | Scheduling; deadline verification; conflict checking.                                                                                                 |
| i9_form.pdf               | Federal I-9 Employment Eligibility Verification form (fillable PDF).                                                                                                                                | I-9 processing during onboarding (Section 11.2).                                                                                                      |
| cobra_election_form.pdf   | COBRA continuation coverage                                                                                                                                                                         | COBRA notification                                                                                                                                    |

|                                |                                                                                                                 |                                                                                          |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
|                                | election form and instructions.                                                                                 | during offboarding (Section 12.2).                                                       |
| applications/ (email folder)   | All candidate application materials received via email from the job posting inbox (applications@crestwood.edu). | Candidate screening after posting closes (Section 15.3).                                 |
| benefits_enrollment_packet.pdf | Benefits plan options, enrollment instructions, and waiver form for new employees.                              | Onboarding — attached to Template 31 for distribution during orientation (Section 11.1). |

|                                    |                                                                                            |                                                                       |
|------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|
| fmla_medical_certification.pdf     | FMLA medical certification form to be completed by the employee's healthcare provider.     | FMLA leave requests — attached to Template 15 (Section 13.1).         |
| background_check_authorization.pdf | Authorization form for pre employment background screening, to be signed by the candidate. | Recruiting — sent to candidate after offer acceptance (Section 15.5). |

### Document Templates (Word)

The following Word document templates are used to generate letters and forms. Fill in all [bracketed] fields before converting to PDF and sending.

|                               |                                                                         |
|-------------------------------|-------------------------------------------------------------------------|
|                               |                                                                         |
| written_warning_template.docx | Written warning letter for progressive discipline (Section 14.3).       |
| pip_template.docx             | Performance Improvement Plan document (Section 14.3).                   |
| requisition_form.docx         | Personnel Requisition Form submitted by hiring managers (Section 15.1). |
| job_posting_template.docx     | External/internal job posting draft (Section 15.2).                     |
| offer_letter_template.docx    | Conditional offer of employment letter (Section 15.5).                  |

## 7. Types of HR Requests

|                        |                                                                                                                                                                              |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                        |                                                                                                                                                                              |
| Onboarding             | New hire processing, I-9 tracking, benefits enrollment, orientation scheduling, IT access requests.                                                                          |
| Offboarding            | Resignation processing, involuntary termination processing, retirement processing, final pay coordination, COBRA notification, exit interview scheduling, access revocation. |
| Leave Management       | FMLA leave requests, ADA accommodation requests, PTO balance inquiries, return-to-work clearance, leave extension requests.                                                  |
| Performance Management | Evaluation scheduling, PIP initiation, progressive discipline (verbal warning, written warning, PIP, termination), probationary review.                                      |
| Recruiting             | Requisition submission, job posting, candidate screening, interview scheduling, offer letter generation, background check initiation, reference checks.                      |



|                    |                                                                                                                                   |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Benefits & Payroll | Benefits enrollment changes, qualifying life events, payroll discrepancy inquiries. All payroll items forwarded to Calvin Briggs. |
| Employee Relations | Workplace complaints, harassment reports, conflict resolution. All complaints forwarded to Marta Voss.                            |
| General Inquiries  | Policy questions, employment verification requests, form requests.                                                                |

## 8. Triage & Routing Rules

Every incoming HR request — whether received by email, Slack, or in person — must be triaged before taking action. Internal HR team messages are exempt from this process.

**Step 1:** Confirm the requester is in employee\_roster.xlsx or recruiting\_tracker.xlsx. If not found, reply using Template 1 and take no further action unless the requester replies with clarifying information.

**Step 2:** Identify the request category per Section 7.

**Step 3:** If the request involves employee relations (workplace complaints, harassment, discrimination), forward immediately to m.voss@crestwood.edu. Reply using Template 2. Take no further action.

**Step 4:** If the request involves payroll or compensation, forward to c.briggs@crestwood.edu. Reply using Template 3. Take no further action.

**Step 5:** Check Jira for existing open tickets for the same employee and request type. If a ticket already exists, add the new information as a comment to the existing ticket. Do not create a duplicate.

**Step 6:** Create a Jira ticket. Use the naming convention and date rules from the table below. Assign to the appropriate HR team member per the routing table.

**Step 7:** Act per the relevant section of this SOP. Use the designated email template from Section 18.

**Step 8:** Complete email housekeeping per Section 17.

### Jira Ticket Naming Convention

Format: [PREFIX]-[Employee Last Name]-[DATE in MMDDYYYY]. The date used depends on the ticket type:

| Onboarding       | ONBOARD  | HR Coordinator on duty | Employee's start date                     |
|------------------|----------|------------------------|-------------------------------------------|
| Offboarding      | OFFBOARD | HR Coordinator on duty | Employee's last day of work               |
| Leave Management | LEAVE    | Patricia Huang         | Date the leave request was received by HR |

|                        |          |                          |                                                                           |
|------------------------|----------|--------------------------|---------------------------------------------------------------------------|
| Performance Management | PERF     | Nicole Ashford           | Date the action was initiated (e.g., PIP start date, evaluation due date) |
| Recruiting             | RECRUIT  | Derek Okonkwo            | Date the requisition was approved                                         |
| Employee Relations     | ER       | Marta Voss               | Date the complaint was received by HR                                     |
| Benefits & Payroll     | BENEFITS | Calvin Briggs / Patricia | Date the request was                                                      |

|  |  |       |                |
|--|--|-------|----------------|
|  |  | Huang | received by HR |
|--|--|-------|----------------|

**Multi-topic requests:** If a single email raises more than one issue, create separate Jira tickets for each. Send one consolidated reply. Apply the highest priority level of any individual issue to the whole email for SLA and folder-routing purposes (see Section 17).

**Replies to previous emails:** Treat as a continuation of the existing case. Add to the existing Jira ticket. Do not create a new ticket. Do not re-send previous templates.

*Exception: If a section of this document defines a different format for the Jira ticket name, use the particular format defined.*

## 9. Priority Matrix & SLAs

| P1 – Urgent | Compliance deadline within 24 hours; legal or safety issue; employee locked out of pay or benefits. | I-9 deadline expiring today; COBRA 14-day notice window closing; employee reports workplace safety threat. | Same business day |
|-------------|-----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|-------------------|

|               |                                                                                                                                    |                                                                                                                     |                 |
|---------------|------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|-----------------|
| P2 – High     | Compliance deadline within 3 business days; formal complaint; FMLA eligibility determination; PIP related termination in progress. | I-9 due within 3 days; FMLA medical certification deadline; formal written complaint requesting escalation.         | 1 business day  |
| P3 – Standard | Routine processing with no imminent deadline; standard onboarding/offboarding ; evaluation scheduling; PTO balance inquiries.      | New hire onboarding (start date > 3 days away); annual evaluation scheduling; standard resignation processing.      | 3 business days |
| P4 – Low      | General inquiries; employment verification; policy questions; document requests.                                                   | Employee asking about PTO policy; request for copy of offer letter; general benefits question answered by handbook. | 5 business days |

## 10. Holidays

HR office hours are Monday–Friday, 8:00am–5:00pm MST. The HR office is closed on all university-observed holidays listed below. No new meetings may be scheduled on Holidays or outside of office hours. SLA timelines count only business days (Monday–Friday, excluding holidays).

### Observed Holidays – 2026

| Holiday                    | 2026 Date                 |
|----------------------------|---------------------------|
| New Year's Day             | Thursday, January 1       |
| Martin Luther King Jr. Day | Monday, January 19        |
| Presidents' Day            | Monday, February 16       |
| Memorial Day               | Monday, May 25            |
| Independence Day           | Friday, July 3 (observed) |
| Labor Day                  | Monday, September 7       |
| Thanksgiving Day           | Thursday, November 26     |
| Day after Thanksgiving     | Friday, November 27       |

|              |                                    |
|--------------|------------------------------------|
| Winter Break | December 24–31 (university closed) |
|--------------|------------------------------------|

# 11. Employee Onboarding Procedure

Onboarding begins when the HR office receives confirmation of a new hire from the hiring department or the recruiting team. The HR Coordinator's role in onboarding is to coordinate, track, and ensure compliance deadlines are met. Physical tasks (such as conducting the in-person orientation session, verifying physical identity documents for the I-9, and issuing ID badges) are performed by the hiring manager or designated campus HR representative. The HR Coordinator provides instructions, templates, and reminders, and records completion in the tracking systems.

## 11.1 Receiving the New Hire Notification

When a new hire is confirmed, the hiring manager or recruiting team will send an email to [hr@crestwood.edu](mailto:hr@crestwood.edu) with the employee's name, personal email address, position, department, campus, start date, and classification (exempt/non-exempt, full-time/part time/faculty).

**Step 1:** Open `employee_roster.xlsx` and add a new row with all provided details. Enter the hire date and set the status to "Onboarding."

**Step 2:** Open `onboarding_checklist.xlsx` and create a new row for the employee. All checklist fields must be blank (not started) at this stage.

**Step 3:** Create a Jira ticket: ONBOARD-[Last Name]-[Start Date MMDDYYYY].

**Step 4:** Post to #hr-onboarding: NEW HIRE: [Employee Name], [Position], [Department], [Campus], Start Date: [MM/DD/YYYY], Jira: [Ticket ID]

**Step 5:** Send Template 4 (Welcome Email) to the employee's personal email address. CC the hiring manager. This email instructs the employee to bring I-9 documents to their first day and provides the list of acceptable documents.

**Step 6:** Send Template 5 (IT Access Provisioning Request) to [j.park@crestwood.edu](mailto:j.park@crestwood.edu). Include: employee name, position, department, campus, start date, and supervisor name.

**Step 7:** Send Template 31 (Orientation Coordinator Request) to the hiring manager. This email instructs the hiring manager to conduct the in-person orientation on the employee's first day and to collect the I-9 documents. Attach `i9_form.pdf` and the `benefits_enrollment_packet.pdf`.

**Step 8:** Create a Calendar event titled "Orientation – [Employee Name]" on the employee's first day, 9:00am–12:00pm MST. Invite the hiring manager and the employee (personal email).

## 11.2 I-9 Employment Eligibility Verification

Federal law requires that Section 1 of the I-9 form be completed by the employee on or before the first day of work. Section 2 must be completed by the employer (the hiring manager or designated campus HR representative who physically examines the documents) within 3 business days of the employee's first day of work. The HR Coordinator's role is to track the deadline, provide the form, and record completion.

**Before Start Date:** The HR Coordinator emails the employee the fillable i9\_form.pdf with instructions to complete Section 1 (fields: Last Name, First Name, Middle Initial, Other Last Names Used, Address, Date of Birth, SSN, Email, Phone, Citizenship/Immigration Status, and Signature/Date) and bring it along with original identity documents to their first day. This is included in Template 4.

**Day 1:** The hiring manager examines the employee's original identity and work authorization documents in person, completes Section 2 of the I-9 form (fields: Document Title, Issuing Authority, Document Number, Expiration Date, Employee's First Day of Employment, Employer Name and Address, Signature, Date), and emails the completed, signed I-9 form as a scanned PDF to hr@crestwood.edu.

**Upon receipt of completed I-9:** Record the I-9 completion date in onboarding\_checklist.xlsx. Update the Jira ticket.

### **I-9 Deadline Tracking:**

**Day 2 (if I-9 not received):** Send Template 6 (I-9 Urgent Reminder) to the hiring manager (not the employee — the hiring manager is responsible for completing Section 2). CC the employee.

**Day 3 (if I-9 still not received):** This is the federal deadline. Send a follow-up to the hiring manager. Post to #hr-escalations: I-9 OVERDUE: [Employee Name], [Employee ID], Start Date: [MM/DD/YYYY], Deadline: [MM/DD/YYYY] – Section 2 not received. Forward to n.ashford@crestwood.edu.

**After Day 3 (deadline passed without completion):** Forward to n.ashford@crestwood.edu and j.whitfield@crestwood.edu. Send Template 7 to the hiring manager notifying them the employee may not continue working until the I-9 is completed. Post to #hr-escalations.

## **11.3 Benefits Enrollment**

New employees have 30 calendar days from their start date to enroll in or waive benefits. If the 30th day falls on a weekend or holiday, the deadline extends to the next business day.

**Day 1:** The benefits enrollment packet PDF is provided to the employee via the hiring manager during orientation (included in Template 31). Record "Packet Provided" and the date in onboarding\_checklist.xlsx.

**Day 15:** If benefits\_enrollment.xlsx does not show an enrollment or waiver for the employee, send Template 8 (Benefits Enrollment Reminder) to the employee. Log the reminder date in onboarding\_checklist.xlsx.

**Day 25:** If still no enrollment or waiver, send Template 9 (Final Benefits Notice) to the employee. CC Patricia Huang. Log in onboarding\_checklist.xlsx.

***Default enrollment effective date rule: The effective date for default enrollment is the first day of the month following the end of the 30-day enrollment window. For example, if the employee's start date is***

**Day 30 (Deadline):** If the employee has not enrolled or waived, the employee will be auto-enrolled in the university's default plan. Update benefits\_enrollment.xlsx with "Default Enrollment" and the date. Send Template 10 to the employee confirming default enrollment.

#### **11.4 Onboarding Completion**

When all items in onboarding\_checklist.xlsx are marked complete (I-9 received, benefits enrolled or waived, IT access confirmed, orientation completed), update employee\_roster.xlsx: change status from "Onboarding" to "Active." Close the Jira ticket. Post to #hr-onboarding: ONBOARDING COMPLETE: [Employee Name], [Employee ID], [MM/DD/YYYY]

## **12. Employee Offboarding Procedure**

Offboarding begins when the HR office receives notice that an employee is separating from the

university. Separation types include voluntary resignation, involuntary termination, retirement, and end of contract. The offboarding procedure includes compliance-critical deadlines, particularly around COBRA notification and final pay.

## 12.1 Receiving Separation Notice

**Voluntary Resignation:** The employee or their supervisor will notify HR by email. Exempt employees are expected to provide 20 business days' notice. Non-exempt employees are expected to provide 10 business days' notice. These are guidelines, not requirements.

**Involuntary Termination:** Notification will come from the HR Director (Nicole Ashford) or the Employee Relations Specialist (Marta Voss). Do not initiate involuntary offboarding without written authorization from one of these two individuals.

**Retirement:** The employee will submit a written notice of intent to retire to HR or to their supervisor, who will forward it to HR.

Upon receiving any separation notice:

**Step 1:** Open employee\_roster.xlsx and confirm the employee's record. Note the hire date, department, campus, and supervisor.

**Step 2:** Create a Jira ticket: OFFBOARD-[Last Name]-[Last Day MMDDYYYY].

**Step 3:** Post to #hr-offboarding: SEPARATION: [Employee Name], [Employee ID], [Separation Type], Last Day: [MM/DD/YYYY], Jira: [Ticket ID]

## 12.2 COBRA Notification

If the separating employee was enrolled in university health benefits, COBRA notification must be sent within 14 calendar days of the employee's last day. This is a federal compliance requirement.

**Step 1:** Open benefits\_enrollment.xlsx and confirm the employee's current benefits enrollment status.

**Step 2:** If the employee was enrolled in health benefits: send Template 11 (COBRA Notification) to the employee within 14 calendar days of their last day. Attach cobra\_election\_form.pdf (listed in Section 6). Record the date sent in the Jira ticket and in benefits\_enrollment.xlsx under the 'COBRA Notification Date' column.

**Step 3:** Update benefits\_enrollment.xlsx: change the employee's status to "Separated – COBRA Notified" and record the notification date.

**If the employee was NOT enrolled in health benefits:** No COBRA notification is required. Note in the Jira ticket: "No COBRA required – employee not enrolled in health benefits." Update benefits\_enrollment.xlsx status to "Separated – No COBRA."

## 12.3 Final Pay & Accrued PTO

Colorado law requires that final pay for terminated employees (involuntary) be issued immediately upon termination. For voluntary resignations, final pay must be issued on the next regular payday.



**Step 1:** Open leave\_tracker.xlsx and locate the employee's current PTO balance in the 'Current PTO Balance' column. Do not attempt to calculate the balance yourself — use the value recorded in the spreadsheet.

**Step 2:** Email c.briggs@crestwood.edu with the employee's name, employee ID, last day of work, separation type, and PTO balance (as read from leave\_tracker.xlsx). Use Template 12.

**Step 3:** Record the final pay request date in the Jira ticket.

## 12.4 Access Revocation

All system access must be revoked on the employee's last day of work. For involuntary terminations, access must be revoked immediately upon notification.

**Step 1:** Email j.park@crestwood.edu using Template 13 (Access Revocation Request). Specify: employee name, employee ID, last day, and whether revocation is immediate (involuntary) or end-of-day on last day (voluntary/retirement).

**Step 2:** Update the Jira ticket when IT confirms revocation.

## 12.5 Exit Interview

Exit interviews are offered to all voluntarily separating employees. They are not conducted for involuntary terminations.

**Step 1:** Send Template 14 (Exit Interview Invitation) to the employee within 2 business days of receiving the resignation notice.

**Step 2:** If the employee accepts, schedule a 30-minute Calendar event titled "Exit Interview – [Employee Full Name]".

**Step 3:** After the exit interview, save the completed exit interview form as a PDF in the employee's file.

Exit interviews must be conducted in person and therefore cannot be scheduled on work from home days.

## 12.6 Offboarding Completion

When all offboarding steps are complete (COBRA sent or noted as not required, final pay requested, access revoked, exit interview completed or declined):

- Update employee\_roster.xlsx: change status to "Separated" and record the last day and separation type.

- Close the Jira ticket.

- Post to #hr-offboarding: OFFBOARDING COMPLETE: [Employee Name], [Employee ID], Separation Type: [Type], Last Day: [MM/DD/YYYY]



## 13. Leave Management Procedure

Crestwood University provides leave in accordance with federal and state law, including the Family and Medical Leave Act (FMLA), the Americans with Disabilities Act (ADA), and Colorado state leave laws. All leave requests are managed by Patricia Huang with support from the HR Coordinator.

### 13.1 FMLA Leave Requests

FMLA entitles eligible employees to up to 12 weeks of unpaid, job-protected leave in a 12-month period. Eligibility requires that the employee has been employed by Crestwood University for at least 12 months AND has worked at least 1,250 hours in the 12 months preceding the leave request.

#### Receiving the Request:

**Step 1:** Open employee\_roster.xlsx and confirm the employee's hire date. Calculate the number of months between the hire date and today's date. If fewer than 12 months, the employee is INELIGIBLE (skip to the ineligible steps below).

**Step 2:** In employee\_roster.xlsx, locate the 'Hours Worked (Trailing 12 Months)' column for the employee. If the value is less than 1,250, the employee is INELIGIBLE.

**Step 3:** If BOTH conditions are met (12+ months employed AND 1,250+ hours), the employee is ELIGIBLE.

#### If ELIGIBLE:

**Step 4:** Send Template 15 (FMLA Eligibility Notice – Approved) to the employee within 5 business days of receiving the request. Attach fmla\_medical\_certification.pdf. The employee has 15 calendar days to return the completed medical certification.

**Step 5:** Create a Jira ticket: LEAVE-[Last Name]-[Date request received MMDDYYYY].

**Step 6:** Post to #hr-leave-requests: FMLA REQUEST: [Employee Name], [Employee ID], Eligible: YES, Certification Due: [MM/DD/YYYY], Jira: [Ticket ID]

**Step 7:** Create a Calendar reminder titled "FMLA Certification Due – [Employee Name]" on the certification deadline date.

**Step 8:** When the medical certification is received, forward to p.huang@crestwood.edu for review. Update leave\_tracker.xlsx with the leave dates and status "Approved – Pending Certification Review."

**Step 9:** After Patricia approves the certification, update leave\_tracker.xlsx status to "Approved." Send Template 16 (FMLA Leave Confirmed) to the employee. CC the supervisor of record.

#### If INELIGIBLE:

**Step 4:** Send Template 17 (FMLA Eligibility Notice – Denied) to the employee within 5 business days. Specify the reason: "employed for fewer than 12 months," "fewer than 1,250 hours worked in the preceding 12 months," or "both." CC Patricia Huang.

**Step 5:** Create a Jira ticket: LEAVE-[Last Name]-[Date request received MMDDYYYY]. Update

leave\_tracker.xlsx with the request date and status “Denied – [Reason].”

### **Medical Certification Not Received Within 15 Days:**

If the employee does not return the medical certification within 15 calendar days: – Send Template 18 (FMLA Certification Overdue) to the employee.

– Post to #hr-leave-requests: FMLA CERTIFICATION OVERDUE: [Employee Name], [Employee ID], Due: [MM/DD/YYYY], [X] days overdue

– Forward to p.huang@crestwood.edu. Patricia will determine whether the leave is denied or an extension is granted.

### **13.2 ADA Accommodation Requests**

When an employee requests a workplace accommodation due to a disability, the university must engage in an interactive process to determine whether a reasonable accommodation can be provided.

**Step 1:** Forward the request to p.huang@crestwood.edu immediately. Do not assess or deny the request yourself.

**Step 2:** Create a Jira ticket: LEAVE-[Last Name]-ADA-[Date request received MMDDYYYY].

**Step 3:** Send Template 19 (ADA Request Acknowledged) to the employee within 2 business days.

**Step 4:** Patricia Huang will coordinate the interactive process. The HR Coordinator assists with scheduling only.

Do not discuss the nature of the employee’s disability or accommodation in Slack. Use email only, and limit recipients to Patricia Huang and Nicole Ashford.

### **13.3 PTO Balance Inquiries**

**Step 1:** Open leave\_tracker.xlsx and locate the employee’s current PTO balance in the ‘Current PTO Balance’ column. Also locate the ‘PTO Accrual Rate’ column for the employee’s accrual rate.

**Step 2:** Reply to the employee using Template 20, including the current balance and accrual rate exactly as shown in the spreadsheet.

### **13.4 Return-to-Work Clearance**

Employees returning from FMLA leave or a medical leave of absence must provide a fitness-for-duty certification from their healthcare provider before returning to work.

**Step 1:** When the employee notifies HR of their intended return date, send Template 21 (Return-to-Work Requirements) specifying the documentation needed.

**Step 2:** When the fitness-for-duty certification is received, forward to p.huang@crestwood.edu.

Update leave\_tracker.xlsx with the return date and status “Returned.”

**Step 3:** Email the supervisor of record confirming the employee is cleared to return. Use Template 22.

## **14. Performance Management Procedure**

Crestwood University uses a progressive discipline model. The steps, in order, are: (1) Verbal Warning, (2) Written Warning, (3) Performance Improvement Plan (PIP), (4) Termination. Each step requires specific documentation. Steps may not be skipped unless authorized in writing by Nicole Ashford or Dr. James Whitfield.

### **14.1 Annual Performance Evaluations**

All staff employees receive an annual performance evaluation. Evaluations are due by June 30 each year for the fiscal year ending on that date. Faculty evaluations follow the academic calendar and are managed by the Provost's Office; this SOP does not cover faculty evaluations.

**March 1:** Email all supervisors using Template 23 (Evaluation Cycle Reminder) listing their direct reports who are due for evaluation. The list is generated from employee\_roster.xlsx by filtering for all active staff employees.

**May 1:** Send a follow-up reminder to supervisors who have not submitted evaluations. Use Template 24.

**June 15:** Send a final reminder to supervisors with outstanding evaluations. CC Nicole Ashford. Use Template 25.

**When evaluations are received:** Update performance\_log.xlsx with the evaluation date, rating, and evaluator name. File the signed evaluation as a PDF.

### **14.2 Probationary Reviews**

All new staff employees are subject to a 90-day probationary period. A probationary review must be completed by the supervisor and submitted to HR no later than the 85th calendar day of employment.

**Day 60:** Email the supervisor using Template 26 (Probationary Review Reminder) reminding them that the review is due by Day 85.

**Day 85:** If not received, send a follow-up to the supervisor. CC Nicole Ashford.

**When received:** Update performance\_log.xlsx. If the rating is "Unsatisfactory," forward immediately to n.ashford@crestwood.edu for review. Do not communicate the result to the employee — that is the supervisor's responsibility.

### **14.3 Progressive Discipline**

#### **Verbal Warning:**

The supervisor delivers a verbal warning and documents it in writing. The supervisor emails a summary to hr@crestwood.edu. The HR Coordinator updates performance\_log.xlsx with the date, type ("Verbal Warning"), and a brief description. No template is sent to the employee.

#### **Written Warning:**

The supervisor drafts a written warning using written\_warning\_template.docx. The supervisor emails

the draft to hr@crestwood.edu for review. Upon receipt, the HR Coordinator forwards the draft to n.ashford@crestwood.edu for approval. Once approved, the supervisor delivers it to the employee and obtains a signature. The signed document is filed as a PDF. Update performance\_log.xlsx.

### **Performance Improvement Plan (PIP):**

PIPs must be approved by Nicole Ashford before delivery. A PIP lasts 30, 60, or 90 calendar days as determined by Nicole Ashford.

**Step 1:** The supervisor drafts the PIP using pip\_template.docx and emails it to hr@crestwood.edu.

**Step 2:** Forward to n.ashford@crestwood.edu for approval.

**Step 3:** Once approved, create a Jira ticket: PERF-[Last Name]-PIP-[PIP Start Date MMDDYYYY].

**Step 4:** Create a Calendar event titled “PIP Review – [Employee Name]” on the PIP end date.

**Step 5:** Post to #hr-performance: PIP INITIATED: [Employee Name], [Employee ID], Duration: [30/60/90] days, End Date: [MM/DD/YYYY], Jira: [Ticket ID]

**Step 6:** The supervisor delivers the PIP and obtains the employee’s signature. File the signed PIP as a PDF. Update performance\_log.xlsx.

**At PIP End Date:** The supervisor submits a PIP outcome report to hr@crestwood.edu. If the employee has met all PIP goals, update performance\_log.xlsx status to “PIP – Completed Successfully.” If the employee has not met PIP goals, forward to n.ashford@crestwood.edu for determination on next steps (PIP extension or termination).

### **Termination (as final step of progressive discipline):**

Termination as a result of progressive discipline requires written authorization from Nicole Ashford AND Dr. James Whitfield. Upon receiving authorization, follow the Offboarding Procedure in Section 12. The separation type is “Involuntary Termination.”

## **15. Recruiting & Hiring Procedure**

All recruiting is coordinated by Derek Okonkwo with support from the HR Coordinator. No position

may be posted or filled without an approved requisition.

### 15.1 Requisition Approval

**Step 1:** The hiring manager submits a Personnel Requisition Form (requisition\_form.docx) to hr@crestwood.edu with the following approvals: department head signature, dean/VP signature, and budget office confirmation.

**Step 2:** Verify all three signatures are present. If any are missing, reply using Template 27 specifying which signatures are needed. Take no further action until all signatures are received.

**Step 3:** Forward to d.okonkwo@crestwood.edu for final approval.

**Step 4:** Once approved, create a Jira ticket: RECRUIT-[Full Position Title]-[Approval Date MMDDYYYY]. Example: RECRUIT-Administrative Assistant-03152026. Update recruiting\_tracker.xlsx with a new row: position title, department, campus, requisition date, status "Approved."

**Step 5:** Post to #hr-recruiting: REQUISITION APPROVED: [Position Title], [Department], [Campus], Jira: [Ticket ID]

### 15.2 Job Posting

All positions must be posted for a minimum of 10 business days. Internal-only postings may be authorized by Derek Okonkwo in writing.

**Step 1:** Draft the posting using job\_posting\_template.docx. Include: position title, department, campus, reporting supervisor, classification (exempt/non-exempt), salary range, minimum qualifications, preferred qualifications, application deadline, and the instruction for applicants to submit materials to applications@crestwood.edu.

**Step 2:** Send the completed draft to d.okonkwo@crestwood.edu for review and approval.

**Step 3:** Once approved, email the finalized posting (as a PDF attachment) to d.okonkwo@crestwood.edu. Derek will handle publishing to the university careers page and any external job boards. Update recruiting\_tracker.xlsx status to "Posted." Record the posting date and application deadline.

**Step 4:** Create a Calendar event titled "Posting Closes – [Position Title]" on the application deadline date.

### 15.3 Candidate Screening

All candidate application materials are submitted by applicants to applications@crestwood.edu. After the posting deadline, Derek Okonkwo will forward all received applications for the position to hr@crestwood.edu for screening.

**Step 1:** Review the application materials forwarded by Derek.

**Step 2:** Screen each application against the minimum qualifications listed in the posting. Mark each candidate in recruiting\_tracker.xlsx as "Meets MQ" or "Does Not Meet MQ."



**Step 3:** Send the list of qualified candidates to d.okonkwo@crestwood.edu and the hiring manager for review.

**Step 4:** Candidates who do not meet minimum qualifications: send Template 28 (Application Not Selected).

#### 15.4 Interview Scheduling

**Step 1:** Once the hiring manager selects candidates for interview, email the hiring manager and any search committee members asking them to provide their available date/time blocks for interviews within the next 10 business days. Use Template 32.

**Step 2:** Once the hiring manager replies with availability, email each selected candidate using Template 33 (Interview Availability Request), listing the available date/time options and asking the candidate to reply with their preferred slot by a specified deadline (3 business days from the email).

**Step 3:** Once candidates respond, assign each candidate to a slot. If multiple candidates select the same slot, assign it to the candidate who responded first and email the other candidate(s) with the remaining options.

**Step 4:** Send Template 29 (Interview Invitation) to each selected candidate with the date, time, location, format (in-person or virtual), and estimated duration.

**Step 5:** Create Calendar events titled “Interview – [Candidate Name] – [Position Title]” for each interview. Invite all participants.

**Step 6:** Update recruiting\_tracker.xlsx with interview dates and candidate status “Interview Scheduled.”

#### 15.5 Offer & Background Check

**Step 1:** Once the hiring manager identifies a finalist, email d.okonkwo@crestwood.edu with the recommended candidate, proposed salary, and start date for approval.

**Step 2:** Once approved, generate the offer letter using offer\_letter\_template.docx. Include: position title, department, campus, supervisor, salary, classification, start date, and the statement that the offer is contingent upon successful completion of a background check.

**Step 3:** Convert the completed offer letter to PDF. Send to the candidate using Template 30. CC Derek Okonkwo and the hiring manager.

**Step 4:** Upon candidate acceptance, initiate the background check by emailing the candidate the background\_check\_authorization.pdf. Update recruiting\_tracker.xlsx status to “Offer Accepted – Background Check Pending.”

**Step 5:** When background check results are received, forward to d.okonkwo@crestwood.edu. If cleared, update status to “Cleared – Ready for Onboarding” and initiate onboarding per Section 11. If not cleared, Derek will determine next steps.

**Step 6:** Send Template 28 to all other interviewed candidates who were not selected. **16.**

## Escalations

Escalate any case to the HR Director (Nicole Ashford) under the following circumstances: – Any P1 issue.

- Any case unresolved for more than 10 business days.
- Any legal threat, reference to an attorney, or mention of a regulatory complaint. – Any situation involving potential harm to an employee or to the university. – Any media inquiry related to HR matters.

**For legal threats:** Do NOT reply to the email. Post to #hr-escalations: LEGAL THREAT: [Employee Name], [Subject Line] – do not reply. Forward to hr-escalations@crestwood.edu. Dr. Whitfield and Nicole Ashford will handle all further communication.

**For media inquiries:** Do NOT reply. Forward to the university's Office of Communications at communications@crestwood.edu and to hr-escalations@crestwood.edu.

## 17. Email Housekeeping

After processing every email, complete the following:

|                       |                                                                                                                                                                     |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                       |                                                                                                                                                                     |
| Mark as read          | Every processed email must be marked as read, without exception.                                                                                                    |
| P1 / P2 emails        | Leave in Inbox. Flag as important. Do NOT move to a folder until the case is fully resolved. Once resolved, keep the flag and move to the appropriate topic folder. |
| P3 / P4 emails        | Move to the matching folder (see below). Do not flag.                                                                                                               |
| Forwarded-only emails | If the only action was to forward (e.g., payroll, employee relations), move to the "General" folder.                                                                |

### Email Folders

Folder names must match exactly as listed below. Do not create new folders or use variations.

|             |                                                                                               |             |
|-------------|-----------------------------------------------------------------------------------------------|-------------|
|             |                                                                                               |             |
| Onboarding  | All onboarding-related emails.                                                                | 1 (highest) |
| Offboarding | All offboarding-related emails, including COBRA and final pay.                                | 2           |
| Leave       | FMLA, ADA, PTO, and return-to-work emails.                                                    | 3           |
| Performance | Evaluations, PIPs, disciplinary actions.                                                      | 4           |
| Recruiting  | Requisitions, postings, candidate communications, offers.                                     | 5           |
| General     | Forwarded-only emails, policy questions, employment verifications, anything already resolved. | 6 (lowest)  |

**Multi-topic email folder rule:** If a single email covers more than one topic that maps to different folders, file the email in the folder with the highest precedence (lowest number in the table above). For example, an email covering both an Onboarding question (precedence 1) and a Leave question (precedence 3) is filed in the Onboarding folder. If the topics have the same precedence, file in the folder listed first in the table.

## 18. Email Templates

Templates must be used as written. Personalize the greeting only. Replace all [bracketed] placeholders with confirmed information before sending. Do not send a template that contains unfilled placeholders.

### **Template 1 – Unrecognized Requester**

Hi [First Name],

Thank you for reaching out to the Crestwood University Office of Human Resources. We were unable to locate your information in our records. If you are a current employee, please reply with your Employee ID and department so we can assist you.

Best regards,

Crestwood University – Office of Human Resources

hr@crestwood.edu

### **Template 2 – Employee Relations Referral**

Hi [First Name],

Thank you for contacting us. Your message has been forwarded to our Employee Relations Specialist, who will follow up with you directly. Please allow 2 business days for initial contact.

Best regards,

Crestwood University – Office of Human Resources

hr@crestwood.edu

### **Template 3 – Payroll Referral**

Hi [First Name],

Thank you for reaching out. For all payroll and compensation questions, please contact our Payroll Liaison, Calvin Briggs, directly at c.briggs@crestwood.edu. Your message has been forwarded to him.

Best regards,

#### **Template 4 – New Hire Welcome**

Hi [First Name],

Welcome to Crestwood University! We are excited to have you join us as [Position Title] in the [Department] department at our [Campus] campus.

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Your first day is [Start Date]. Your supervisor, [Supervisor Name], will conduct your orientation session beginning at 9:00am MST. Please bring the following:

- Two forms of identification for I-9 verification (see acceptable documents list attached) – Voided check or bank routing information for direct deposit setup

Attached to this email is the I-9 form (i9\_form.pdf). Please complete Section 1 of the form before your first day and bring it with you along with your original identity documents.

If you have any questions before your first day, please do not hesitate to reach out.

Best regards,

Crestwood University – Office of Human Resources  
hr@crestwood.edu

#### **Template 5 – IT Access Provisioning Request**

Hi Jenna,

Please provision the following IT access for a new employee:

Name: [Employee Name]

Position: [Position Title]

Department: [Department]

Campus: [Campus]

Start Date: [Start Date]

Supervisor: [Supervisor Name]

Please have credentials ready by [Start Date]. Thank you.

Best regards,

Crestwood University – Office of Human Resources  
hr@crestwood.edu

#### **Template 6 – I-9 Urgent Reminder**

Hi [Hiring Manager First Name],

This is an urgent reminder regarding the I-9 Employment Eligibility Verification for [Employee Name] ([Employee ID]). The federal deadline for completing Section 2 of the I-9 is [Deadline Date]. We have not yet received the completed form.

Please examine the employee's original identity and work authorization documents, complete Section 2 of the I-9, and email the scanned signed form to [hr@crestwood.edu](mailto:hr@crestwood.edu) as soon as possible.

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Best regards,

Crestwood University – Office of Human Resources

[hr@crestwood.edu](mailto:hr@crestwood.edu)

### **Template 7 – I-9 Deadline Passed – Supervisor Notification**

Hi [Supervisor First Name],

This is to inform you that the I-9 Employment Eligibility Verification for [Employee Name] ([Employee ID]) has not been completed by the federal deadline. [Employee Name] may not continue working until this requirement is fulfilled. Please do not assign work to this employee until further notice from the HR Office.

This matter has been escalated to the HR Director.

Best regards,

Crestwood University – Office of Human Resources

[hr@crestwood.edu](mailto:hr@crestwood.edu)

### **Template 8 – Benefits Enrollment Reminder (Day 15)**

Hi [First Name],

This is a reminder that your benefits enrollment deadline is [Deadline Date] (30 calendar days from your start date). We have not yet received your enrollment selections or benefits waiver.

Please complete your enrollment at your earliest convenience. If you have questions about your options, contact Patricia Huang at [p.huang@crestwood.edu](mailto:p.huang@crestwood.edu).

Best regards,

Crestwood University – Office of Human Resources

[hr@crestwood.edu](mailto:hr@crestwood.edu)

### **Template 9 – Benefits Final Notice (Day 25)**

Hi [First Name],

This is a final notice that your benefits enrollment deadline is [Deadline Date]. If we do not receive your

enrollment selections or a signed benefits waiver by this date, you will be automatically enrolled in the university's default health plan.

Please contact Patricia Huang at [p.huang@crestwood.edu](mailto:p.huang@crestwood.edu) immediately if you need assistance.

Best regards,  
Crestwood University – Office of Human Resources  
[hr@crestwood.edu](mailto:hr@crestwood.edu)

### **Template 10 – Default Benefits Enrollment Confirmation**

Hi [First Name],

As your benefits enrollment deadline of [Deadline Date] has passed without a completed enrollment or waiver, you have been automatically enrolled in Crestwood University's default health plan effective [Effective Date].

If you have questions or believe this is in error, please contact Patricia Huang at [p.huang@crestwood.edu](mailto:p.huang@crestwood.edu).

Best regards,  
Crestwood University – Office of Human Resources  
[hr@crestwood.edu](mailto:hr@crestwood.edu)

### **Template 11 – COBRA Notification**

Hi [First Name],

This notice is to inform you that your group health coverage through Crestwood University will end on [Coverage End Date] due to [separation of employment / reduction in hours].

Under the Consolidated Omnibus Budget Reconciliation Act (COBRA), you may be eligible to continue your current health coverage for up to 18 months at your own expense. Attached to this email is the COBRA election form ([cobra\\_election\\_form.pdf](#)) and instructions. You have 60 calendar days from the date of this notice to elect COBRA continuation coverage.

If you have questions, please contact Patricia Huang at [p.huang@crestwood.edu](mailto:p.huang@crestwood.edu).

Best regards,  
Crestwood University – Office of Human Resources  
[hr@crestwood.edu](mailto:hr@crestwood.edu)

### **Template 12 – Final Pay Request to Payroll**

Hi Calvin,

Please process final pay for the following separating employee:

Name: [Employee Name]

Employee ID: [Employee ID]

Last Day of Work: [Date]

Separation Type: [Voluntary Resignation / Involuntary Termination / Retirement] Accrued

PTO Balance: [X] hours (per leave\_tracker.xlsx)

Per Colorado law, [if involuntary: final pay is due immediately upon termination / if voluntary: final pay is due on the next regular payday].

Best regards,

Crestwood University – Office of Human Resources

hr@crestwood.edu

### **Template 13 – Access Revocation Request**

Hi Jenna,

Please revoke all system access for the following employee:

Name: [Employee Name]

Employee ID: [Employee ID]

Last Day of Work: [Date]

Timing: [End of business on last day / Immediately]

This includes email, VPN, building access, and all university systems. Please confirm when complete.

Best regards,

Crestwood University – Office of Human Resources

hr@crestwood.edu

### **Template 14 – Exit Interview Invitation**

Hi [First Name],

As part of our offboarding process, we would like to offer you the opportunity to participate in an exit interview. This is completely voluntary and confidential. Your feedback helps us improve the employee experience at Crestwood University.

If you are interested, please reply with your availability and we will schedule a 30-minute meeting before your last day of [Last Day].

Best regards,

Crestwood University – Office of Human Resources



### **Template 15 – FMLA Eligibility Notice – Approved**

Hi [First Name],

We have reviewed your request for leave under the Family and Medical Leave Act (FMLA). Based on our records, you meet the eligibility requirements (employed for [X] months; [X] hours worked in the preceding 12 months).

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To proceed, please complete and return the attached Medical Certification Form within 15 calendar days of this notice (due by [Due Date]). Failure to return the certification by this date may result in denial of your FMLA leave request.

If you have questions, please contact Patricia Huang at p.huang@crestwood.edu.

Best regards,

Crestwood University – Office of Human Resources

hr@crestwood.edu

### **Template 16 – FMLA Leave Confirmed**

Hi [First Name],

Your FMLA leave has been approved. Your leave details are as follows:

Leave Start Date: [Date]

Expected Return Date: [Date]

Leave Duration: [X] weeks

Please note that a fitness-for-duty certification from your healthcare provider will be required before you can return to work. Please contact us at least 5 business days before your intended return date.

Best regards,

Crestwood University – Office of Human Resources

hr@crestwood.edu

### **Template 17 – FMLA Eligibility Notice – Denied**

Hi [First Name],

We have reviewed your request for leave under the Family and Medical Leave Act (FMLA). Unfortunately, you do not meet the eligibility requirements at this time. The reason for ineligibility is: [employed for fewer than 12 months / fewer than 1,250 hours worked in the preceding 12 months / both].

You may be eligible for other types of leave. Please contact Patricia Huang at p.huang@crestwood.edu to discuss your options.

Best regards,  
Crestwood University – Office of Human Resources  
hr@crestwood.edu

### **Template 18 – FMLA Certification Overdue**

Hi [First Name],

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This is a reminder that your FMLA Medical Certification Form was due on [Due Date] and has not been received. Your FMLA leave request cannot be processed without this documentation.

Please return the completed form as soon as possible. If you need an extension, please contact Patricia Huang at p.huang@crestwood.edu immediately.

Best regards,  
Crestwood University – Office of Human Resources  
hr@crestwood.edu

### **Template 19 – ADA Accommodation Request Acknowledged**

Hi [First Name],

Thank you for submitting your request for a workplace accommodation. Your request has been received and forwarded to our Benefits & Leave Manager, who will coordinate the interactive process with you.

You can expect to be contacted within 5 business days to discuss your request and next steps.

Best regards,  
Crestwood University – Office of Human Resources  
hr@crestwood.edu

### **Template 20 – PTO Balance Response**

Hi [First Name],

Your current PTO balance as of [Date] is [X] hours. Your accrual rate is [X] hours per pay period.

If you have questions about your balance or accrual rate, please contact Patricia Huang at p.huang@crestwood.edu.

Best regards,

## **Template 21 – Return-to-Work Requirements**

Hi [First Name],

Thank you for notifying us of your intended return date of [Date]. Before you may return to work, we require a fitness-for-duty certification from your healthcare provider confirming that you are able to perform the essential functions of your position.

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Please submit this documentation to hr@crestwood.edu at least 2 business days before your intended return date.

Best regards,  
Crestwood University – Office of Human Resources  
hr@crestwood.edu

## **Template 22 – Return-to-Work Clearance – Supervisor Notification**

Hi [Supervisor First Name],

[Employee Name] ([Employee ID]) has been cleared to return to work effective [Return Date]. Please coordinate their return schedule directly.

Best regards,  
Crestwood University – Office of Human Resources  
hr@crestwood.edu

## **Template 23 – Annual Evaluation Cycle Reminder**

Hi [Supervisor First Name],

This is a reminder that annual performance evaluations for fiscal year [Year] are due by June 30, [Year]. The following employees on your team are due for evaluation:

[List of employee names]

Please complete and submit evaluations to hr@crestwood.edu by the deadline.

Best regards,  
Crestwood University – Office of Human Resources  
hr@crestwood.edu

## **Template 24 – Evaluation Follow-Up (May 1)**

Hi [Supervisor First Name],

This is a follow-up regarding outstanding annual evaluations due by June 30, [Year]. The following evaluations have not yet been received:

[List of employee names]

Please submit as soon as possible.

Best regards,

Crestwood University – Office of Human Resources

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hr@crestwood.edu

## **Template 25 – Final Evaluation Reminder (June 15)**

Hi [Supervisor First Name],

This is a final reminder. The following evaluations are due by June 30, [Year] and have not been received:

[List of employee names]

Failure to complete evaluations by the deadline will be noted in your own performance record.

Best regards,

Crestwood University – Office of Human Resources

hr@crestwood.edu

## **Template 26 – Probationary Review Reminder (Day 60)**

Hi [Supervisor First Name],

[Employee Name] is currently in their probationary period, which ends on [End Date]. A probationary review must be submitted to hr@crestwood.edu by [Day 85 Date] (Day 85 of employment).

Please complete the probationary review form and return it by the deadline.

Best regards,

Crestwood University – Office of Human Resources

hr@crestwood.edu

## **Template 27 – Requisition – Missing Signatures**

Hi [First Name],

Thank you for submitting the Personnel Requisition Form for [Position Title]. The following required signatures are missing: [list missing signatures].

Please obtain the required signatures and resubmit. We cannot proceed with the posting until all approvals are in place.

Best regards,  
Crestwood University – Office of Human Resources  
hr@crestwood.edu

## Template 28 – Application Not Selected

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Dear [Candidate Name],

Thank you for your interest in the [Position Title] position at Crestwood University. After careful review, we have decided to move forward with other candidates whose qualifications more closely match the requirements of this position.

We appreciate the time you invested in your application and encourage you to apply for future openings.

Best regards,  
Crestwood University – Office of Human Resources  
hr@crestwood.edu

## Template 29 – Interview Invitation

Dear [Candidate Name],

We are pleased to invite you to interview for the [Position Title] position at Crestwood University.

Date: [Date]  
Time: [Time] MST  
Location: [Location / Virtual Link]  
Format: [In-Person / Virtual]  
Estimated Duration: [Duration]

Please confirm your attendance by replying to this email by [RSVP Date]. If you require any accommodations, please let us know.

Best regards,  
Crestwood University – Office of Human Resources  
hr@crestwood.edu

### Template 30 – Offer Letter Transmittal

Dear [Candidate Name],

On behalf of Crestwood University, I am pleased to extend an offer of employment for the position of [Position Title] in the [Department] department. Please find the formal offer letter attached as a PDF.

This offer is contingent upon successful completion of a background check. Please review the attached offer letter and return a signed copy to hr@crestwood.edu by [Response Deadline. Set the deadline to 3 business days from current day].

We look forward to welcoming you to Crestwood University.

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Best regards,

Crestwood University – Office of Human Resources

hr@crestwood.edu

### Template 31 – Orientation Coordinator Request

Hi [Hiring Manager First Name],

[Employee Name] is scheduled to begin as [Position Title] on [Start Date]. As the hiring manager, please conduct the in-person orientation on their first day. Orientation should include:

- Welcome and introductions
  - Workspace and building tour
  - Collecting the employee's completed I-9 Section 1 form and verifying their original identity/work authorization documents in person
  - Completing Section 2 of the attached I-9 form (i9\_form.pdf)
  - Scanning and emailing the signed, completed I-9 form to hr@crestwood.edu –
- Distributing the attached benefits enrollment packet to the employee
- Ensuring the employee signs the employee handbook acknowledgment and emailing it to hr@crestwood.edu

IT credentials will be prepared by Jenna Park and sent to the employee on their start date. Parking and ID badge requests should be submitted through your campus facilities office.

Please confirm receipt of this email.

Best regards,

Crestwood University – Office of Human Resources

hr@crestwood.edu

**Template 32 — Interview Availability Request**

Hi [Hiring Manager First Name],

We are ready to schedule interviews for the [Position Title] position. Please reply with your available date/time blocks within the next 10 business days. If there are search committee members who need to attend, please include their availability as well or CC them on your reply.

Best regards,  
Crestwood University – Office of Human Resources  
[hr@crestwood.edu](mailto:hr@crestwood.edu)

**Template 33 — Interview Availability Request**

Dear [Candidate Name],

Thank you for your interest in the [Position Title] position at Crestwood University. We would like to schedule an interview and have the following date/time options available: [List of available date/time slots]

Please reply with your preferred option by [RSVP Date]. If none of these work, please suggest two alternative times and we will do our best to accommodate.

Best regards,  
Crestwood University – Office of Human Resources  
[hr@crestwood.edu](mailto:hr@crestwood.edu)

**19. Default Formats**

Where a section in this SOP specifies an exact Slack or Jira format, use that format. Where no specific format is given and an action is required, use the defaults below.

**Default Slack Notification Format**

[SOP SUBHEADER]: [Employee Name], [Employee ID], Jira: [Ticket ID]

*Example: FINAL PAY & ACCRUED PTO: Maria Torres, E-1042, Jira: OFFBOARD-Torres 03152026*

**Default Jira Ticket Description**

When creating a Jira ticket, the ticket description starts empty. Only add fields to the description when explicitly instructed by a section of this SOP. Use the exact field format below when adding each field:

|  |  |  |
|--|--|--|
|  |  |  |
|--|--|--|

|               |                            |                                                                                |
|---------------|----------------------------|--------------------------------------------------------------------------------|
| Employee Name | Employee Name: [Full Name] | The section references a specific employee                                     |
| Employee ID   | Employee ID: [ID]          | The section references a specific employee                                     |
| Assignee      | Assignee: [Full Name]      | The section or routing table (Section 8) specifies who to assign the ticket to |
| Priority      | Priority: [P1/P2/P3/P4]    | The section instructs you to assign a priority per Section 9                   |
| Deadline      | Deadline: [MM/DD/YYYY]     | The section involves a compliance or action deadline                           |
| Status        | Status: [value]            | The section involves a compliance or action deadline                           |

When the SOP instructs you to update a Jira ticket (e.g., changing status or adding a deadline), update the relevant field in the description. Use the Jira comment format to log the change.

### Default Jira Comment Format

[Date and time] [SOP SUBHEADER] — [Action] — [Object]

Do not leave comments unless an SOP section explicitly requires it." immediately prior to "The Action must be one of the following" in the Default Jira Comment Format section. The **Action** must be one of the following:

|                        |                                                                                       |
|------------------------|---------------------------------------------------------------------------------------|
|                        |                                                                                       |
| TEMPLATE SENT          | An email template was sent. Object = "Template [#] to [recipient email]"              |
| FILE ATTACHED          | A file was attached to an outgoing email. Object = "[filename] to [recipient email]"  |
| EMAIL FORWARDED        | An email was forwarded to an internal team member. Object = "to [recipient email]"    |
| SPREADSHEET UPDATED    | A spreadsheet field was updated. Object = "[filename] — [column name] set to [value]" |
| CALENDAR EVENT CREATED | A Calendar event was created. Object = "[event title] on [MM/DD/YYYY]"                |
| CALENDAR EVENT REMOVED | A Calendar event was deleted. Object = "[event title] on [MM/DD/YYYY]"                |
| SLACK POSTED           | A Slack message was posted. Object = "[channel name]"                                 |
| WAITING ON             | The case is blocked pending input. Object = "[who] — [what is needed]"                |



|                    |                                                                                                              |
|--------------------|--------------------------------------------------------------------------------------------------------------|
| CONFIRMED RECEIVED | Required documentation or confirmation was received. Object = "[document or item name] from [sender]"        |
| TICKET UPDATED     | An update to a field in the Jira ticket description. Object = "[Field Name] from [old value] to [new value]" |
| ESCALATED          | The case was escalated. Object = "to [recipient name/email] — [reason]"                                      |
| CLOSED             | The ticket is complete. Object = "All steps completed."                                                      |

*Examples: 02/18/2026 10:30am [13.1] — TEMPLATE SENT — Template 15 to [j.smith@crestwood.edu](mailto:j.smith@crestwood.edu)*

### **Default Email Subject Line Format**

When composing a new email (not a reply or forward), use the following subject line format:

[Template Name] — [Employee Last Name or Candidate Last Name], [Employee ID if applicable]

When replying or forwarding, keep the existing subject line. Do not modify it. Page 40 | Crestwood