

***Sample Completed Documentation of Career Development***

***Career Shift –Administrative Services Specialist (PAA2) to Accountant (PBF1)***

# Documentation of Career Development – **Classification Change**

**Complete Directions for Form available at**: <http://hr.uiowa.edu/career-development/form-instructions>

## Section 1 – Demographics (Employee and/or Supervisor)

Employee Name: Mary Hawk Current Classification/Job Code: Admin Svcs Spec / PAA2

Department: Big Department Supervisor: Adam Accountant

Initiated by: Adam Accountant Date Initiated: 12/1/2017

## Section 2 - Scope/Responsibilities (Employee and/or Supervisor)

Please list the six most important activities that are performed. If the duty is new since the last time the employee/position was classified, please indicate so and note the % of effort for the new work. Identify the Key Areas of Responsibilities (KAR) for those six activities and the classification associated with it (which may be the current classification or another one). Identify the total or overall amount of time spent in performing each activity. The percentage of time cannot exceed 100%, however, the percentage of time can be less than 100% because we are only asking for the top six most important activities. The new duties should be performed for an appropriate period of time that is sufficient enough to evaluate the employee’s performance and continuing success in the role. The period of time necessary for evaluation is at the discretion of the college/division. Examples of completed Documentation of Career Development Forms are found at <http://hr.uiowa.edu/career-development/form-instructions>.

| Position Specific Duties | Is this a new duty? | Key Area of Responsibility | Classification | Overall or Total % of Effort |
| --- | --- | --- | --- | --- |
| Monitor accounts, review and approve expenditures, and reconcile monthly financials for the department. Previously performed this duty only for the unit at about 5% of effort. The new duties represent an additional 15% of effort. | [x]  | Financial Oversight & Budgeting: Monitor accounts/expenditures; reconciles statements. | Accountant | 20 |
| Prepare monthly reconciliations and assists Senior Accountant in month end and year end reporting. | [x]  | Financial Reporting: Complete basic and some complex reconciliations and reporting | Accountant | 10 |
| Analyze department expenses and prepare reports for Senior Accountant for further analysis and recommendations to department leadership. Previously performed this duty for the unit only at about 5% of effort. The new duties represent an additional 10% of effort. | [x]  | Financial Analysis and Planning: May perform limited analysis and prepare standard reports. | Accountant | 15 |
| Make original and correcting journal entries; approve transactions; open and close accounts as directed by Senior Accountant for entire department. Previously performed this duty at about 3% of effort. The new duties represent an additional 7%. | [x]  | Transaction Processing: Initiate basic and/or routine original and correcting journal entries | Accountant | 10 |
| Maintain records of accounting transactions for the department. Previously performed this duty at about 2% of effort. The new duties represent an additional 8%.  | [x]  | Compliance: Maintain records | Accountant | 10 |
| Research purchases, costs, etc., for budget development for the department. This duty represents a completely new duty and 10% of effort. | [x]  | Financial Oversight & Budgeting: May assist with unit budget information. | Accountant | 10 |

## Section 3 – Employee Recommendation Job Classification/Career Development (Only if Employee Initiated)

Which job classification (may be current or different) do you feel best matches the changes documented on this form?

Title: Accountant Jobcode: PBF1

This appears to qualify for: [ ]  Career Advancement [ ]  Promotion [x]  Career Shift [ ]  No Change

The following section is for Supervisors Only

## Section 4 – Supervisor Section

### Assessment/Comments

Document if and how the employee has assumed each of the new, changed or expanded duties/competencies and the importance of these duties/competencies to unit operations.

As Mary's supervisor, I am submitting this request for a career shift. Due to a resignation and lack of resources to rehire, Mary has expanded her financial skills which she performed as part of her Administrative Services Specialist job to assist me in managing the finances of our large department. Our department has many accounts in various funding streams which require vigilance to assure financial integrity and meeting budget. Mary's accounting background has provided her the basis for continued skill development and the focused expansion of her responsibilities into accounting. It is time to recognize this shift in responsibilities as Mary has been fully performing accounting work for most of the last year.

### Overall performance rating at last formal performance review

Date of Last Review: 3/27/2017

Did the employee receive a performance rating of “Successfully Meets Expectations” or higher on their most recent performance evaluation? [x]  Yes [ ]  No

### Job Classification/Career Development Recommendation

Which job classification (may be current or different) do you feel best matches the changes documented on this form?

Title: Accountant Jobcode: PBF1

This appears to qualify for: [ ]  Career Advancement [ ]  Promotion [x]  Career Shift [ ]  No Change

## Section 5 – Employee and Supervisor Electronic Signature

I agree that this represents a true and accurate documentation of the work being performed.

[x]  Supervisor [x]  Employee

 Date: 12/5/2017

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