



Reclassifying Merit Employees

Compensation & Classification

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Reclassifying Merit Employees – Topics Covered



KNOWING WHEN TO
RECLASSIFY



WHAT FORMS ARE
NEEDED



HOW REQUESTS ARE
PROCESSED



SALARY
ADJUSTMENTS FOR
RECLASSIFICATIONS



APPEAL PROCESS



OTHER
CONSIDERATIONS

Knowing When to Reclassify Merit Employees



- Permanent changes have occurred in the nature of the duties
- Additional responsibilities are outside of the current classification

Note: Under normal circumstances, an employee serving in the first six months of their probationary period is not eligible for a reclassification.

Forms Needed for Merit Reclassification Requests

- Position Classification Review (Cover Sheet of PDQ)
- Position Description Questionnaire (PDQ)
- Unit organizational chart showing location of the position under review
- Change of Status – Merit/SEIU Job Reclassification (HR Transaction System)

Any additional information provided by the employee or department is optional and welcome

Where to Find Forms

CONTACT COMPENSATION
& CLASSIFICATION:



WEBSITE

[HTTPS://HR.UIOWA
.EDU/CAREERS/ME
RIT-
POSITIONS/MERIT-
CLASSIFICATION-
REVIEW](https://hr.uiowa.edu/careers/merit-rit-positions/merit-classification-review)

OR



PHONE

(319) 335-5298



EMAIL

COMP-CLASS@UIOWA.EDU

Position Classification Review (Merit)

- Used as a cover sheet to note employee information (name, department, current classification, etc.)
- Used to note classification requested (supervisor must make recommendation)
- Date signed or forwarded by employee is used to establish effective date of reclassification and new merit review date
- Workflow form is used to show request has been routed through appropriate individuals for review

Merit Position Description Questionnaire (PDQ)

- The purpose of this questionnaire is to gather information on the duties and responsibilities of a position. Please provide descriptive information in sufficient detail to establish a clear understanding of the position.
- This information may be supplemented by personal interviews and/or observation. Please do not hesitate to call Human Resources if you have any questions.



Main Aspects of PDQ

To describe briefly the purpose or the function of the position

To note supervisory responsibilities

To describe regularly performed duties and approximate percent of time spent on these duties

To note demonstrable changes in duties since the last review of the position

The Purpose or Function of the Position

- What is the primary purpose or function of the position?
 - The primary purpose statement is typically 1-3 sentences



Supervisory Responsibilities

Functional

- Train
- Schedule
- Assign Work
- Check Work

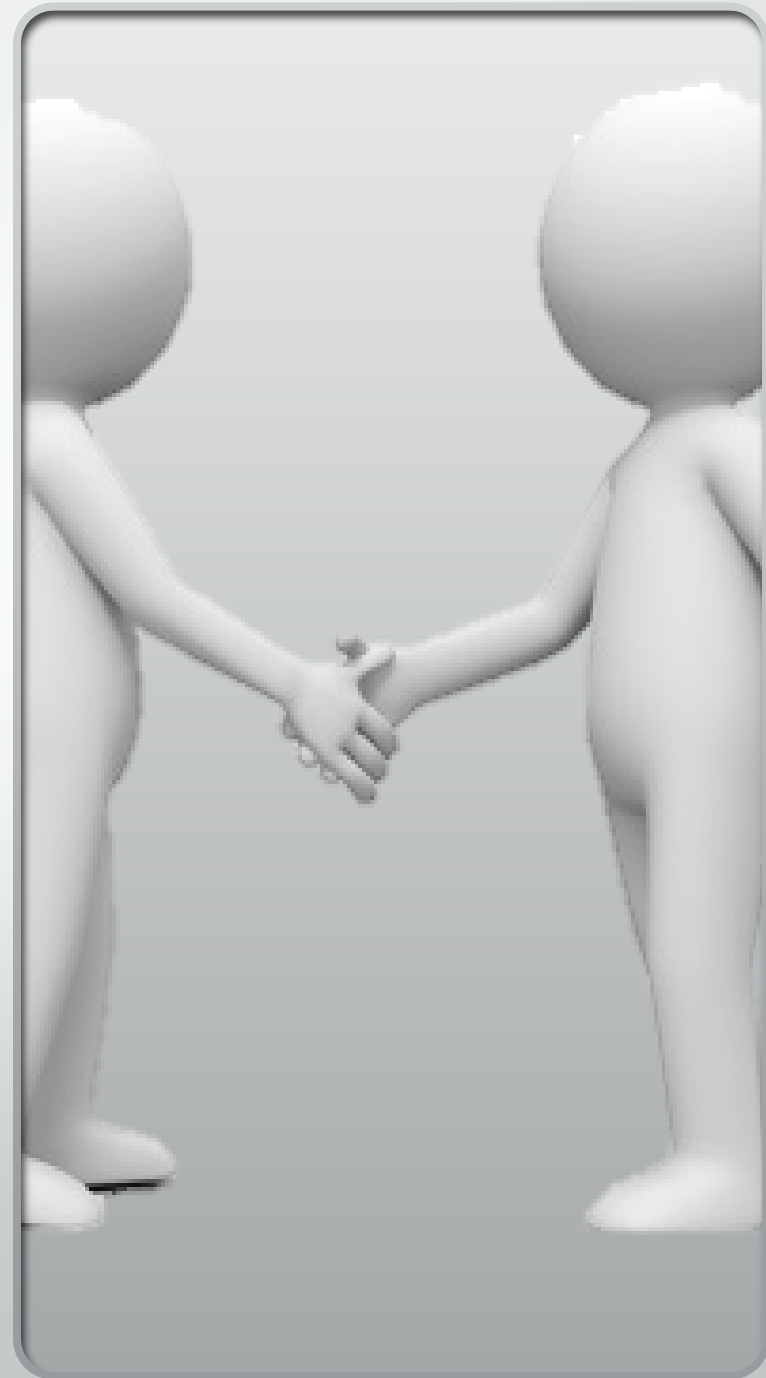
Administrative

- Hire
- Discipline
- Sign Evaluation
- Terminate

To be classified as Merit Supervisory Exempt, an employee must exercise administrative supervision over regular Merit staff.

Personal Interaction

- The purpose of this section is to show the purpose and frequency of contact with staff outside of the department.
- Be specific when describing the purpose of contact.
- Estimate the frequency of contact based on normal circumstances.



Functional Information

- The purpose of this page is to allow the person reviewing the PDQ to understand the environment in which the position is located.
- Briefly describe the responsibility for money, machines, equipment, etc.
- Questions concerning physical requirements are typically more relevant with blue collar, technical and security positions but may be a factor in other positions as well.

Task Statements

- Be sure the total percent of time equals 100%.
- Do not confuse % of time with % of time spent using equipment.
- Use detail to describe regular tasks.
- Explain acronyms and other terms that may be unfamiliar to those reviewing the PDQ.

Tips for Writing Good Task Statements

- Create a list of all the duties assigned to the position (brainstorm)
- Group together duties that seem to logically go together
- Draft your task statements



Drafting a Task Statement

- Use an action verb (i.e. prepares, coordinates).
- Describe the object of the action in specific terms.
- If necessary, describe any programs or systems used in accomplishing the task.
- List the task statements in order of importance or time spent in each area.

Examples of Task Statements

- Composes correspondence in response to questions concerning departmental admissions policies.
- Verifies expenditures and credits with statements of accounts; monitors accounts and initiates invoices, vouchers and other transactions for the department.
- Inspects, maintains, and makes operating repairs on electronic equipment, plumbing fixtures and heating, air conditioning and ventilating equipment.
- Assists in planning procedures and work methods and advises or recommends revision for the purpose of improving the efficiency of operations.

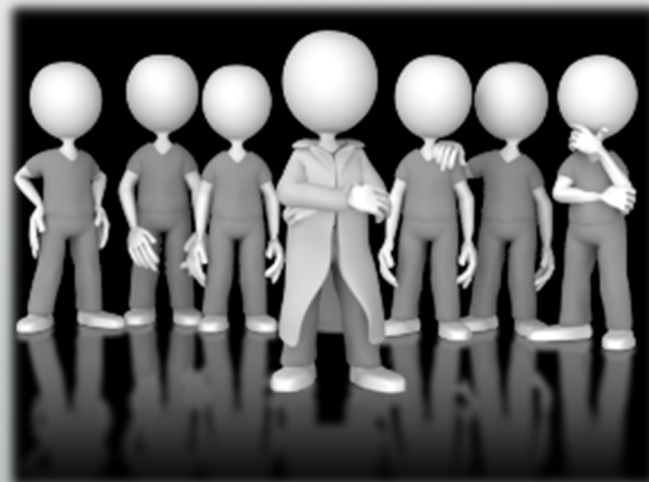
Changes in Position

- Describe new duties since incumbent began working in the position or since the last time the position was classified.
- The “Last Review” refers to the last time that the position was classified.

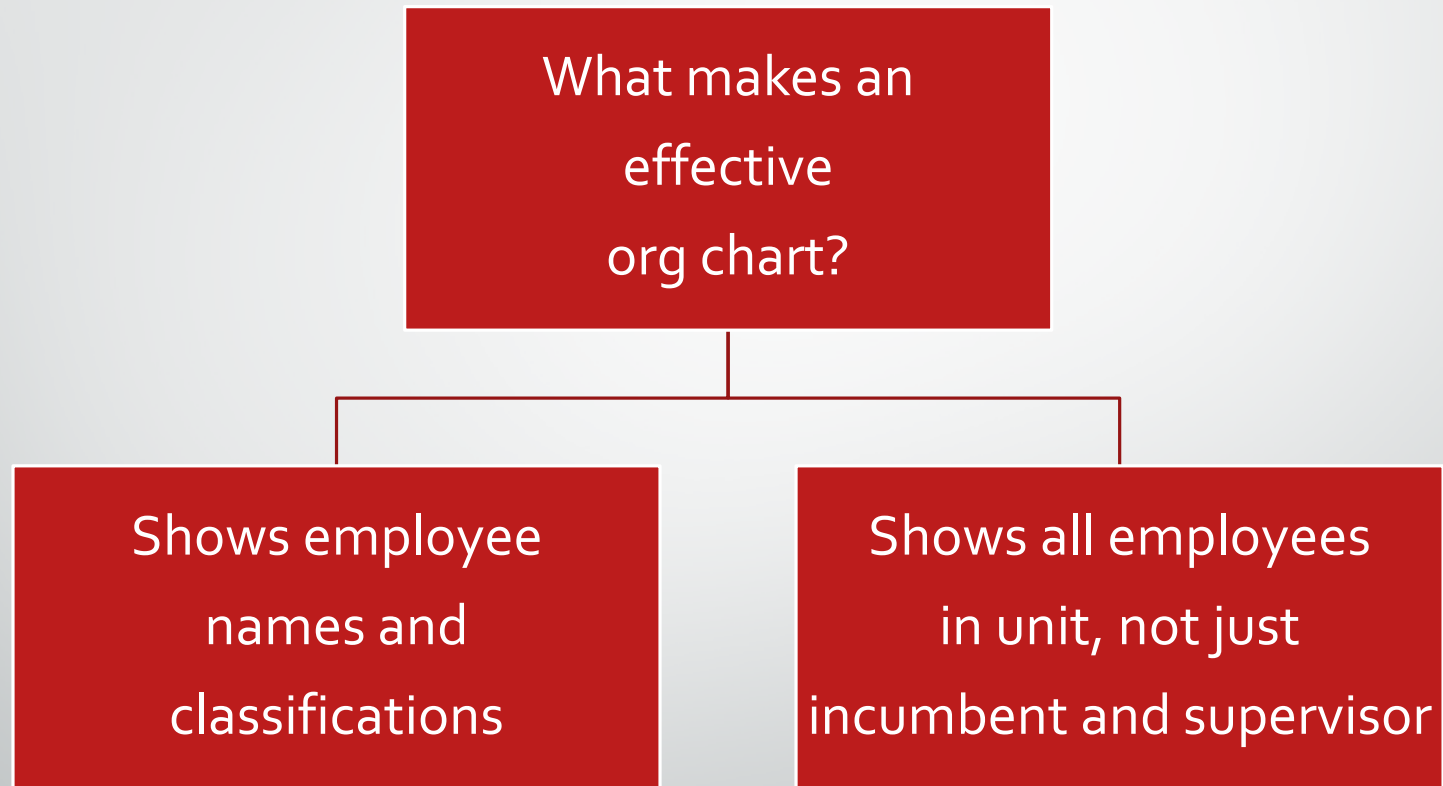
Note: Future duties to be assigned to the position cannot be considered in the reclassification evaluation.

Statement of Supervisor

- Information provided in this section is specific to the position under review and not the classification.
- Information is considered an estimate based on the supervisor's knowledge of the position.



Organizational Chart



How Requests Are Processed

Employee and/or supervisor completes PDQ

Within 10 working days, the supervisor forwards PDQ to Department Head for review

The Department Head recommends a classification and forwards PDQ to the College/Org HR Office

The College/Org Administrator recommends a classification and forwards request to Comp/Class

Within 20 working days, Comp/Class makes classification recommendation to Board of Regents

Within 20 working days, Board of Regents communicates their decision to Comp/Class

Comp/Class communicates decision to Dept. Head

Dept. Head communicates decision to employee and supervisor

Within 15 working days, the Dept. Head, employee or supervisor may appeal the decision

Salary Adjustments for Reclassification

- The standard promotional increase is 4.5% if the position is reclassified one or two grades higher.
- If the position is reclassified three grades or more, an employee may receive an additional 4.5% increase, at the department's discretion.
- Exceptions to the standard promotional increase will be reviewed on a case by case basis and must be consistent with the Merit Rules.
- For lateral reclassifications, there is no change in pay or review date.
- Refer to “Pay on Promotion” in Merit Rules - 3.39(3) for more information.

Appeal Process

- Supervisor or Employee submits a letter requesting appeal of decision within 15 working days of decision to the Merit System Director of the Board of Regents.
- The contact information is located on the Board of Regents letterhead returned with the decision.



Appeal Process (cont.)

- Employee or supervisor submits request
- Board sends letter acknowledging request
- Board establishes committee to review appeal via conference call
- Board contacts supervisor and employee to schedule time for conference call
- Once a time is scheduled, Board sends copies of review packet to all parties

Appeal Process (cont.)

- Appeal committee consists of:
- A Human Resources consultant who is not affiliated with the Board of Regents serves as the chair of the committee
- A Classification Analyst from another Regents institution (typically Iowa State or UNI)
- A University of Iowa Merit employee from the classification requested or someone in the merit system who is familiar with the classification



Appeal Process (cont.)

- If denied, the appeal decision is final for one year from the date of decision
- If approved, the reclassification is effective retroactive to the date on the Position Classification Review form
- It usually takes about 1-3 months to complete the appeal process and receive notification of appeal decision

Current Address & Fax

Regents Merit System Director

11260 Aurora Avenue

Urbandale, IA 50322-7905

Phone: (515) 281-3934

Fax: (515) 281-6420

<http://www.regents.iowa.gov/>

For More Information

- Refer to the [Merit Rules](#) on the Classification & Compensation [website](#)
- [Contact](#) Compensation & Classification