Reclassifying Merit Employees

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Reclassifying Merit Employees – Topics Covered in Slide Show

- 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

http://hr.uiowa.edu/careers/merit/classification-review

or contact Compensation & Classification:

Phone: 335-1848 or 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
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.
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

What makes an Effective Org Chart?

- Shows employee names and classifications
- Shows all employees in unit, not just incumbent and supervisor
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

- Employee automatically receives a “one-step” increase if the position is reclassified one or two grades higher.
- If the position is reclassified three grades or more, employee may receive a “two-step” increase, at the department’s discretion.
- For lateral reclassifications, there is no change in pay or review date.
- Refer to “Pay on Promotion” in Merit Rules - 3.39(3).
Salary Adjustments for Reclassification

- “One-step” increase: A 4.5% hourly increase based on the rate at the time of submission.
- “Two-step” increase: Two 4.5% hourly increases based on the rate at the time of submission. This is done instead of a simple 9% increase in order to compound the progression through the pay grade.
- The next merit review date is one year from effective date of reclassification unless the employee moves to the minimum rate of the new pay grade (then next merit review date is in 6 months).
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.
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 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/
Benefits Changes

- If an employee wishes to be reclassified from Merit Bargaining to either Merit Exempt or P&S, they are encouraged to contact the Benefits Office at 335-2676 to discuss their situation.

- Each individual situation is different because of key factors: health care plan/coverage, salary and time of university service.
For More Information

- Refer to the Merit Rules on the Classification & Compensation web site
- Contact Compensation & Classification

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