DELEGATED AUTHORITY CLASSIFICATION CHECKLIST

REVIEW ON-LINE JOB DESCRIPTION

SUMMARY TAB
- Reason for submitting
    - if replacement, put name of previous employee in the "Replacement for" field
    - new position versus reclass (check to see if over 50% change from previous classified jd)
    - "Recruitment for replacement, different title" – considered as a new position, but should still review previous jd (especially if change in Bargaining Unit)
    - Update – only for small changes (supervisor, location, tasks – ***not*** functions)
    - "Reclassification, significant changes - review of title" - If one or more functions have changed, the job card should be re-reviewed for appropriate classification (with classification comments), even if there is ultimately no change

OVERVIEW TAB
- Working Title:
    - for non-MSP positions, should not use an MSP title (e.g. Director)
    - should not be the same as the payroll title (ex. – SRA I) – remove the number
    - for represented positions – avoid using working titles such as "Manager"
- New field in job description – Department/Project Overview
- Position Overview
    - include summary of all functions – should not include individuals tasks
    - KSA's should not to be included in overview
- Special Conditions: Licenses, certifications, environmental conditions, travel, overtime (only for non-exempt positions), etc.
- Supervisory designation
    - must meet HEERA requirements
        - supervise at least 2.0 FTE career employees
        - duties must be substantially different from subordinates
    - supervisory language must be present on job card - copy ***verbatim*** from SVCAA HR web site
    - ensure the names/positions on the org chart match those listed on the job description
    - employees supervised through others should only be listed if they report to direct subordinates
    - only Compensation unit may designate positions as supervisory
    - if a position is no longer meets the HEERA requirements, it should be changed to non-supervisory - call Compensation to discuss first
    - unless greater than 20%, the supervisory function should be rolled into a larger function
- Work Direction: for those who do not qualify for supervisory designation as noted above
    - no employees should be shown under "Employees Directly Supervised"
    - do not use the word "supervise" in functions/tasks
    - you may include "Work Direction" as part of another Function. For tasks, put, "Assists supervisor with….." and then you can put in some of the supervisory language. OR you can put the statement, "Provides work direction to: _____" and leave off the other tasks which are supervisory.

FUNCTIONS TAB
- Functions should be ordered from most to least important (usually, but not always, by % time)
- Only truly essential functions should be designated as such
- Ensure functions/tasks add up to 100% (even if overall position is less than 100%)
- Task statements should be ordered from most to least important
- Task statements: Start with action verbs (list available on Academic Affairs HR web site) – not "Responsible for…"
- No longer necessary to include frequency of tasks (D, M, Q, Y, "as needed")

KSA TAB
- KSA's should be order from most to least important – REQUIRED first, then ACQUIRED, then PREFERRED
- If the class specs list a minimum qualification, include as a REQUIRED KSA
- Degree – cannot be REQUIRED if not required on specs. Can use "degree or equivalent experience…" or be designated as PREFERRED (possible exception – MSP positions)
- UCSD experience – if REQUIRED, would eliminate anyone from outside UCSD. Use PREFERRED

ENVIRONMENT TAB
- Ensure all activities are selected

SUPPLEMENT – RECLASS REQUEST
- Reclass supplement is REQUIRED for reclasses, optional (but encouraged) for new positions
  - may wish to include supporting documentation (email, letter, etc.) if no supplement is completed
- Confirm that the changes to the position match on both the reclass supplement and the job description
- Make sure changes over time (additions and deletions) are documented in the reclass supplement – especially if changes are substantial (greater than 50%)

SUPPLEMENT – PROGRAMMER/ANALYST
- Required for all Programmer/Analyst (P/A) and Computer Resource Specialist (CRS) positions
- Departments have delegated authority for CRS and P/A I, all other P/A level positions should be submitted to HR Compensation, for classification by the P/A Advisory Committee (PAAC)

ORG CHART
- Should include names AND payroll titles (not working titles), showing clear supervisory lines
- Should be uploaded to job description before submission to campus HR or PARC committee

CLASSIFICATION / CLASSIFY TAB
- Discuss position with incumbent and/or supervisor first, if you have questions
- Compare position to the class specs/series concepts, series overview and/or task/factor matrices (if available)
- Compare position to similar job descriptions
    - keep in mind that some job descriptions in the library are not well written or very weak - always refer back to specs or other classification resources if in question
    - when identifying comp cards look first within department, then Division, then all of Academic Affairs
        - only consider comp cards outside of Academic Affairs for MSP positions
    - resources managed and organizational structure are to be taken into consideration when comparing job cards - resource profiles are available for all Academic Affairs units
- If requesting a HEERA change (bargaining unit change/removal or supervisory designation)
    - classify position within delegated authority, but send to HR Compensation for approval
- Document classifier comments (for those with delegated authority) - rationale for classification should include:
    - classification specifications reviewed
    - comparison to other jobs (include job description numbers if in JD Library)
    - other comments relevant to the classification decision

ROUTE/SUBMIT JOB CARD
- To PARC committee or HR Compensation, as appropriate
- System will not allow you to submit the job card to HR unless functions/tasks add up to 100% (even if overall position is less than 100%)
- Only the HR Contact or Alternate Authority (as noted in the overview tab of the job card), may submit the job card to Compensation

PRIOR TO NOTIFICATION OF RESULT
- Wait for HR confirmation (via email) that job card has been sent to the JD library, which may include the following information
    - approval of supervisory designation
    - approval of bargaining unit change/removal (including confidential designation)
- Don't communicate the classification to the supervisor/employee until confirmation has been obtained

NOTIFICATION OF RESULT – to supervisor/employee
- Notify the supervisor in writing (email OK) of the classification decision
    - include the rationale for decision (classifier comments) to keep a written record of comments since they are no longer visible once job description is submitted
- You may cc: the employee or have the supervisor notify them directly