

Guidelines to Prepare for the Reclassification/Reallocation Process

- Update the required **Position Description (PD)** and obtain the appropriate signatures: 1) Clearly and accurately list all of the higher-level changes to the duties and responsibilities, including the function (*role*) of the position and 2) Develop and include all requested information in accordance with the [Position Description Format Instructions](#). Improperly formatting the PD for a position audit request and omitting required information, such as assigning percentages to duties, creates delays.
- Update the required **Organizational Chart**: 1) Identify the reporting lines for the incumbent's unit/department, including employees directly supervised by the incumbent and 2) Include the names and titles of unit/department employee. Omitting information creates delays.
- Verify that the incumbent has been performing higher-level duties for at least six (6) months before submitting the request.
- Determine if the incumbent meets the minimum qualifications indicated on the [Class Specification](#) for the requested class title. SHR Employment Services can assist with this process and answer any questions as needed. An employee cannot be moved to a new classification if she/he cannot establish eligibility for the classification.
- Confirm if the incumbent has completed the [Online Application](#) and updated it, if more than a year old. She/he should include all educational attainment and all work experience, including the new duties for the position, providing as much detail as possible. SHR Employment Services uses the application to evaluate whether employees meet the minimum requirements set forth by the requested classification. **Please Note: The incumbent should not submit an exam request during this update. Classification & Compensation will take care of this as part of the audit process, as necessary.**
- Refer the incumbent to the State Universities State Civil Service System website for [General Test Taking Guidelines](#) and [Study Guides/Reading Lists](#) that are available for some civil service examinations.
- Address concerns by the incumbent and/or unit/department before submitting the formal request to SHR. Once a formal request is received, our goal is to move forward in a timely manner. Once the position audit has been conducted, we must move forward with rendering a decision and processing the reclassification to completion, regardless of, for example, potential layoff activity.
- Prepare the incumbent and supervisor for the position audit interview. The goal of the reclassification/reallocation process is to determine if the incumbent is performing **higher-level** duties typical of another classification level/series that 1) are permanently assigned to the position and 2) comprise the majority of the duties to warrant a reclassification/reallocation. As such, the incumbent and supervisor should be thoroughly prepared to articulate and answer questions pertaining to these **higher-level** changes. **Please Note: Doing more of the same type of work or tasks does not warrant a reclassification/reallocation decision. Job performance and longevity also do not affect the employee's classification.**
- Confirm the availability of the employee and supervisor to participate in the audit process following submission of the request. Does the incumbent or supervisor have any upcoming scheduled leaves of absence or major work commitments within the first 2-3 weeks following the submission of the request?
- If unit/department is requesting the audit, discuss and confirm with administrative approvers the potential promotional increase request and funding sources.