

## **VIMS Office of Human Resources Employee Compensation & Classification Review Checklist**

With the pre-approval of the VIMS CFO and the guidance of the Senior HR Client Partner in the Office of Human Resources at VIMS, a manager or supervisor may submit a request to reclassify an employee who has begun performing higher level duties, give an employee an in-band adjustment (for classified employees only) or give an employee a market adjustment (for University employees only). Hourly and temporary positions are typically not re-classified or given market adjustments.

### **Initial Steps for Managers or Supervisors:**

Prior to initiating a Compensation & Classification review, the manager or supervisor (hereafter manager) should schedule a meeting with the VIMS CFO to discuss potential implications of the action for the VIMS budget. Assuming preapproval by the CFO, the manager will then:

Update the Position Description (PD) in People Admin using the classification/compensation action screen.

Tips: To get there after you login to People Admin, you will need to be in the position management area of People Admin. This is accessed through the menu in the upper left of the screen (look for ...). The ribbon header for “Positions” is **orange** instead of **blue** for “Hire”. Click on “Position Descriptions” and then select the category of the position that needs to be updated or reclassified (ignore the “action” options). When you select the position from the list by clicking on the title, or using the “action” option to “view”, you will be given the option to “Update/Reclassify Existing Position Description.”

For “major” actions, complete a “Classification/Compensation Review” form (see attached example; electronic version is available here: <https://www.wm.edu/offices/hr/forms-topic/index.php>) and upload the form into People Admin as an attachment.

For “minor” actions, add a note in People Admin that details the minor changes made, e.g. re-allocation of time to existing duties; addition of new minor duties or responsibilities. If HR needs additional information, or feels that the changes are not minor, you will be contacted for additional information.

Review all information to ensure that it is correct and then save the action in People Admin.

Notify VIMS HR that the action is ready for HR review by sending an email to: [VIMS-hr@vims.edu](mailto:VIMS-hr@vims.edu). (Is this necessary, or does PA notify automatically?)

In consultation with the manager, the Senior HR Client Partner reviews and updates the PD to ensure that: 1) the job duties are reflective of the employee’s current duties, and 2) the education, competencies, and experience are position specific, rather than employee specific. An employee should be able to meet the required qualifications for the new PD.

### **The Compensation & Classification Review Process and Approval Steps:**

It is important for the manager to recognize that numerous approvals are required in the university’s classification and compensation review process. People Admin automates the routing

process. After VIMS HR reviews the duties in the PD for appropriate classification and determines the appropriate salary based on the employee's experience in the job, the requested action is sent to the Department Head (Level 1) on behalf of the manager (Hiring Official). For compliance purposes, VIMS HR maintains an audit report of the analysis and adds a note in PeopleAdmin that the review has been completed. If the Department Head approves the action, PeopleAdmin routes it to the VIMS CFO (Level 2). Following review and approval by the VIMS CFO and W&M HR (Classification/Compensation) the action must be approved by the W&M Chief HR Officer (CHRO) for operational employees or the Provost for professional employees. Following approval by the CHRO or Provost, grant-funded positions (index begins with 7) are routed to VIMS' Office of Sponsored Programs and Office of Finance (Budget) for approval, while VIMS funded positions (index begins with 1) are sent directly to VIMS' Office of Finance (Budget). Following the final budget approvals the action is sent back to W&M HR (Classification/Compensation). W&M HR finalizes the action and notifies VIMS HR.

### **Final Steps and Notifications:**

The final approval may be for an in-band adjustment, market adjustment or re-classification of the job. For Classified, Operational and Professional staff, VIMS HR creates a "results memo" which serves as official notification of the final action. The memo is delivered to the manager, along with the updated position description and a copy of the memo for the employee. The manager is encouraged to deliver the memo to the employee in person. VIMS HR also sends a copy of the memo to W&M HR, and for professional staff, a copy is sent to the Office of the Dean and Director as notification and for further action.

**Note:** Please allow at least 3 - 4 weeks from when VIMS HR receives notification the action is ready for review until the action is approved. Late spring, summer and the end of the calendar year are the busiest times for HR actions. Please plan accordingly.



Banner ID # :	Employee Name:	Position #:
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**PROPOSED SALARY/BONUS**

<b>CURRENT WORKING TITLE</b>	<b>PROPOSED WORKING TITLE</b>	<b>PROPOSED PAY BAND/ U-RANGE</b>
<b>CURRENT ANNUAL SALARY/HOURLY RATE</b>	<b>PROPOSED ANNUAL SALARY/HOURLY RATE</b>	<b>PERCENTAGE INCREASE</b>

**JUSTIFICATION FOR ACTION REQUESTED – *If more space is needed, attach an additional page.***

**WHY IS THIS ACTION BEING REQUESTED?** (Provide a general justification statement then address the questions listed below. The information will be used to ensure a complete and accurate classification and support an expedited process. You may be contacted for additional information).

**Are there comparable positions that perform the same type of work that would assist in classifying this position? If so, please provide position details, position number, dept., etc.**

**Describe the major changes in duties and reason for change. Where were the functions performed/assigned previously? What impact does this change have on other positions in the department? If so, provide the position description number (s) that are impacted.**

**Scope – This position has an impact (check areas that apply) and provide explanation.**

<input type="checkbox"/> Unit/Department	<input type="checkbox"/> School/Division	<input type="checkbox"/> University	<input type="checkbox"/> Statewide
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**Please select all of the following that apply to this position to determine the level of discretion and independent judgment held? Please provide an example of the function(s) for the ones you select.**

**Authority to formulate, affect, interpret, or implement management policies or operating practices.**

**Describe:**

**Carries out major assignments in conducting the operations of the university.**

**Describe:**

**Performs work that affects business operations to a substantial degree.**

**Describe:**

**Authority to commit the university in matters that have significant financial impact.**

**Describe:**

**Authority to waive or deviate from established policies and procedures without prior approval, and other factors set forth in the regulation.**

**Describe:**

**Authority to negotiate and bind the university on significant matters.**

**Describe:**

**Provides consultation or expert advice to management.**

**Describe:**

**Involved in planning long-or short-term business objectives.**

**Describe:**

**Investigates and resolves matters of significance on behalf of management.**

**Describe:**

**Represents the university in handling complaints, arbitrating disputes or resolving grievances.**

**Describe:**

**Please list the number of employees, by type of position that the employee supervises:**

**None**

**Students**

**Hourly**

**Operational/Classified**

**Professional**

**Provide any additional information you feel would be helpful in classifying/reclassifying this position.**