SCOPE: The purpose of this guideline is to create consistency in processing reclassifications and equity adjustments in Facilities and Operations. This document will outline the steps that Executive Directors should follow in submitting a Reclassification/Equity adjustment request for employees.

DEFINITIONS: RECLASSIFICATION for an existing position may be warranted when a job function changes significantly. A reclassification can result in the employee’s Market Title change and/or Working Title change (see note for details). Reclassifications can be submitted each months with the exception of July & August (Merit processing months).

Examples:
- Substantial increase in job responsibility
- Decrease in job complexity
- New supervisory authority
- Departmental reorganization

Note:
- An employee’s current salary rate, length of service, or volume of work alone does not justify a Reclassification. It should be additional job responsibilities.
- Working Titles promotions are only recognized as reclassifications when there is not a Market Title Series to assist with development. Any titles used for Working Title promotions must be on the approved list determined by F&O HR. Attachment IX will show a list of working titles that fall into this category, but this list may have additional titles added. For the most updated list, you may email (F&OHR@umich.edu).
- If a “new position” is created, a department cannot Reclassify an employee into that position. The position must be posted and the employee can apply for the position.

EQUITY ADJUSTMENT is only recommended when an employee is out of the recommended F&O Salary Ranges for their Market Title and/or Working Title. Adjustments are reviewed only once a year when the new market data is released (usually in February).

TEMPORARY RECLASSIFICATION is due to considerable job duty changes that will be assigned to employee for a temporary amount of time (must have end date).

Examples:
- An employee is temporarily assigned another Market Title’s duties.
- An employee is temporarily assigned added duties that would place employee into a managerial position.

IMPORTANT NOTE: Temporary Reclassifications are approved at the Department’s Executive Director level (see Procedures for details).

ANNUAL MERIT PROGRAM is the salary increase program that is only offered once a year in September. The program is determined each year by the University. University budgets for this program are determined on April 1st.
**RESPONSIBILITY:**
Refer to attachments VI & VII (flowcharts)

Employee’s Supervisor is responsible for initiating a Reclassification when appropriate.

F&O HR will assist Employee’s Supervisor and Department’s Executive Directors on equity recommendations and Market Titles when requested.

Department’s Executive Director will review and approve all forms and reports before sending them to the Associate VP for Facilities and Operations Office (AVPFO Office).

AVPFO Office will coordinate the review process by the Facilities and Operations Review Committee (FORC) and Central Human Resource Representatives. When the process is complete AVPFO Office will notify the Department’s Executive Director of results.

FORC will evaluate each request and offer concerns or approve changes.

Human Resource Representatives will process the request and inform AVPFO Office of paperwork completion.

**PROCEDURES:**
Refer to attachments VI & VII (flowcharts)

**Supervisor:**

1. Determine that a request for a Reclassification is appropriate for employee(s).
   
   **Note:**
   - If the request is for more than four employees from one Market Title the supervisor must contact the F&O HR Office for assistance in determining recommendations before proceeding to complete the formal request paperwork (see attachment IV).
   - For three or less employees being reclassified from one Market Title the supervisor will not need to contact F&O HR before proceeding.

2. Complete the following form(s):
   
   i. **Reclassification** requests require both the “F&O Reclassification Request Form” (attachment II) and “Position Description Form” (attachment III).
      
      **Note:**
      - When completing the necessary forms, please use: the staff member’s full name (no nicknames) and the employee UofM ID number (no Social Security Numbers). Please reference to “Wolverine Access” for the listing of all employees’ official information. [https://wolverineaccess.umich.edu/](https://wolverineaccess.umich.edu/)
      - If the supervisor is unable to obtain data, please contact the person within their Department that handles HR issues for assistance or email F&OHR@umich.edu for assistance.

3. Attach the appropriate F&O Salary Range information that determined proposed salary rate (Contact FOHR for F&O Salary Ranges)
   
   **Note:**
   - If the supervisor is unable to obtain data, please contact the person within their Department that handles HR issues for assistance or email F&OHR@umich.edu for assistance.

4. Provide information that substantiates that the employee is currently performing desired tasks at an acceptable level for all Reclassification Requests.
   
   **Note:**
   - Prior performance evaluations may be used as supporting documentation.

5. Submit all the completed form(s) to the Department’s Executive Director for review.
Department's Executive Director:

Reclassification:

1. Review and confirm ALL information on the submitted form(s) and the F&O Salary Range.

2. Agree with the request and support its submittal.

3. Complete the “Monthly Reclassification Check-Off List” (see attachment I).

4. Submit all the form(s), Check-Off List, and the F&O Salary Range to the AVPFO Office.

   Note:
   - To support F&O’s initiative to move towards a paperless environment, all form(s) and reports should be submitted electronically via email to the Office of the AVPFO-annz@umich.edu
   - The completed request must be submitted by the first working day of the month to be considered for that month’s review (September-June)
   - Exception: The Department’s Executive Director can approve Temporary Reclassifications without going to the AVPFO for review first. However, the Department’s Executive Director must submit in writing to the AVPFO Office within 30 days the following information (Name of employee, UMID#, current Market Title, current salary, temporary Market Title, temporary salary, increase %, start date of Temporary Reclassification, end date of Temporary Reclassification, and a brief justification for change).

Equity Adjustment:

F&O equity adjustments are reviewed annually when the new market data is released (usually in February).

1. The spreadsheets for review are created by F&O HR and submitted to the Department’s Executive Director for review/approval.

2. Executive Director reviews listed equity adjustment candidates to determine if employee has met work performance, is not under discipline actions, and department can support the budget of compensation increase.

3. Submit the spreadsheet to the AVPFO Office (annz@umich.edu) for processing.

   Note:
   - Exception: Requests for exceptions must be made to: F&OHR@umich.edu

AVPFO Office:

1. Review the request to ensure all information is accurate, complete, and complies with all HRAA requirements.

2. Compile a report that will reflect that month’s submittals. The report will be sent to each F&O Executive Director for review prior to meeting.

3. Schedule a meeting for the F&O Review Committee (FORC) to review each proposed Reclassification/Equity Request.

   Note:
   - FORC reviews monthly the rationale for the requested Reclassification/Equity Adjustments.
4. Complete the HR Change Order Form after the F&O Review Committee approves the request.

Note:
- The only individual authorized to sign off on a Reclassifications/Equity “HR Change Order Form” within F&O is the AVPFO.
- The AVPFO may also seek additional information or deny the request if felt inappropriate or unacceptable.
- The two types of Reclassifications/Equity Adjustments that require both the AVPFO written approval and the additional approval by the Associate Vice Presidents Review Committee are:
  - Any increase in salary 10% and over
  - Major classification/compensation actions, projects and reorganizations affecting Market Titles of more than three individuals in one organization at the same time.

5. Forward all signed paperwork to UHR for HR Representatives to process the Reclassification/Equity Adjustments request.

Note:
- UHR is the only agent authorized to change terms and conditions of employee appointments. Please do not discuss potential changes with your employees until the Office of the Associate VP for Facilities and Operations notifies the Executive Director of the UHR approval.

6. Notify the Department’s Executive Director when the Reclassification or Equity Adjustment is completed and the employee can be informed of the change.

Note:
- All Reclassifications and Equity Adjustments become effective on the date the Reclassification/Equity Adjustment request is received by the AVPFO Office. Only those requests approved by the Department's Executive Director are accepted.

ATTACHMENTS:
- Attachment I  F&O Monthly Reclassification Check-Off List.
- Attachment II  F&O Reclassification Request Form.
- Attachment III  U of M Position Description Form.
- Attachment IV  F&O Monthly Reclassification/Equity Adjustment Definitions/References.
- Attachment V  F&O Monthly Reclassification Questions and Answers.
- Attachment VI  Reclassification Process Flow Chart.
- Attachment VII  Equity Adjustment Process Flow Chart.
- Attachment VIII  F&O Salary Range/Report
- Attachment IX  List of approved Working Titles allowed for Reclassification Promotions
  (For the most up to date list contact F&OHR@umich.edu)