FAS Classification Review Form (CRF)

This form is intended to collect the necessary information to determine the classification of a new position or the reclassification of an existing position due to significant permanent changes to employee’s current responsibilities. This will also act as the basis for a position description.

If you have any questions while completing this form, please contact your HR Consultant.

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| **Please check one:**  **Classification  Reclassification/Review  Vacant Reclassification** | |
| **Employee (or previous incumbent):** | **Department/Center/Unit:** |
| **Employee HUID:** | **Department Administrator:** |
| **Current Title:** | **Manager:** |
| **Current Job Grade Level:** | **Date Completed by Employee:** |
| **Current Position Number:** | **Date Finalized by Manager:** |
| **Proposed Title:** | **Date Received by HR Consultant:** |
| **Current/Proposed FTE:** | **Date Received by Classification Analyst:** |

# Section 1: Position Purpose

Please provide a summary (3-4 sentences) explaining how this position fits within the organizational structure. **Please submit an organizational chart along with this form.**

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# Section 2: Essential Functions

## Breakdown of time:

* Think about time currently spent on activities that are essential to the role. List each responsibility and the approximate percentage of your time spent (ideally not less than 5%). For full time staff, 5% is 1.5 hours per week,10% is 3.5 hours per week, 20% is 7 hours per week.
* **If this is a reclassification or a vacant reclassification, please separate activities that are new tasks or responsibilities.**

**In order for a reclassification to be considered, 30% or more of the job (content and responsibility) must have changed and the incumbent must be successfully performing at this level for at least six months.**

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| **Less helpful example** |  | Manages staff (10%). |  | **More helpful example** |  | Interviews and hires staff,  assigns and reviews work, conducts annual performance reviews and takes corrective action, up to and through termination, as needed (10%). |

**Click** [**here**](http://hr.fas.harvard.edu/files/fas-hr/files/crf_sample_essential_functions_6-4-13.pdf) **to view a suggested list of activities and sample entries that are common to many positions.**

**Click** [**here**](http://hr.fas.harvard.edu/files/fas-hr/files/information_technology_appendix_to_crf.docx) **to complete the Information Technology (IT) Appendix to the CRF.**

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| **Essential Functions (List the assigned work in order of importance)** | **% of time (must total 100%)** | **Indicate New or Changed** | **If new/changed, month and year duty began** |
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# Section 3: Position Scope and Impact

Please explain the amount and breadth of responsibility, complexity, scope and impact this position has on the department/center/FAS/Harvard. Describe the constituents, both internal and external to Harvard, with whom this position works most closely (examples: students, faculty, other centers, FAS administrative departments, the Provost’s office, HBS, etc.)

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# Section 4: Working Conditions

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| Work Setting (office, lab, frequently outside, multiple locations): |  |
| Travel Requirements (% of time, local, out-of-state, international): |  |
| Physical Requirements: (Pushing, pulling, lifting, repetitive motion |  |
| Other: |  |

# Section 5: Critical Position

Select one of the following designations for this position:

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| **On-Campus Critical Position:** The employee is required to report to campus to his/her normal work location (or an alternate site if necessary) for non-deferrable work during an emergency closure or curtailment. An employee serving in an on-campus critical position may have to report to work even if the emergency closure occurs during a time that he/she is not regularly scheduled to work. |
| **Remote Access Critical Position:** The employee is required to perform non-deferrable work during emergency closures or curtailments but is not necessarily required to do so at his/her normal workspace. Instead, a remote access employee may perform his/her non-deferrable work remotely from home or another off-campus location. |
| **Standby Position:** A position that is not designated as critical and as such its incumbent is not required to work during an emergency closure or curtailment. (Note: as outlined above, any position may be designated as critical at any point during an emergency, even if not designated as critical prior to the emergency.) |

# Section 6: Decision Making

Indicate the level of decision-making called for by this position. *Make one selection.*

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| Decisions generally affect own job or specific functional area. May make recommendations to work procedures, policies and practices. |
| Decisions may affect a work unit or area within a department/center. Job may contribute to business and operational decisions that affect the department/center. |
| Decisions contribute to the management and operations of an area within a department/center. Job may contribute to important strategy, operational and business decisions that affect the department/center. |
| Decisions have major implications on the management and operations of a department/center. Job contributes to important strategy, operational and business decisions that affect the department/center. Job may contribute to decisions on the overall strategy and direction of a division or FAS. |
| Decisions have significant, broad implications for the overall strategy, management and operations of a division or FAS. Job may contribute to decisions on the overall strategy and direction of the University. |
| Provide examples/additional information if desired: |

# Section 7: Independence of Action

Indicate the position’s general level of independence. *Make one selection.*

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| Work is closely monitored by manager. Activities and decisions are somewhat routine; detailed instructions and procedures are generally provided. |
| Work progress is monitored by manager; Activities and decisions are varied, requiring analysis or interpretation of the situation; incumbent follows precedents and procedures, and may set own priorities and organizes work within general guidelines established by manager. Incumbent carries out work activities independently; manager is available to resolve problems. |
| Results are defined and existing practices are used as guidelines. Activities are highly varied, complex and often non-recurring, requiring novel and creative approaches to resolution. Supervisor provides broad guidance and overall direction. Incumbent carries out work activities independently; refers unusual problems to manager. |
| Results are defined; incumbent sets own goals and/or goals for functional area. Determines how to accomplish results with few or no guidelines to follow, although precedents may exist; manager provides broad guidance and overall direction. |
| Sets direction and vision for department/center/division. Activities are broad, complex and abstract, often involving University-wide issues. Must develop solutions using substantial creativity, resourcefulness, innovation, negotiation, and diplomacy. Establish priorities, develops policies and allocates resources. |
| Provide examples/additional information if desired: |

# Section 8: Directing/Managing the Work of Others

Check the following responsibilities if applicable:

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| **Position does not have management responsibilities:** |
| **Position manages:**  Regular benefits-eligible staff  Temps/LHTs/Contractors  Students |
| Determines work methods (How to perform a task) |
| Plans work operations (What tasks to perform and when) |
| Interviews/selects employees |
| Interviews and makes effective hiring recommendations |
| Disciplines employees/makes termination decisions |
| Evaluates employee performance |
| Provides employee training and development |
| Provides indirect supervision/functional guidance |

# Section 9: Budgetary/Financial Responsibility

Check the item(s) below which best describe the incumbent’s involvement in the budgetary process.

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| **Position does not have budget/financial management responsibilities** |
| Budget planning and preparation |
| Forecasting responsibilities |
| Maintaining and monitoring responsibilities |
| Ability to approve expenditures? If yes, please provide the dollar amount: $0.00  Ability to reallocated |
| Budget Responsibility for which incumbent has primary or overall responsibility (please specify which in each case)   * Operating: $0.00 (include annual $) * Grants:       (Indicate number of grants here) * Pre-Award: $0.00 (include annual $) * Post-Award: $0.00 (include annual $) * Sponsored Research: $0.00 (include annual $) |

# Section 10: Work Experience, Education and Background Screen Information

Indicate the minimum level of education, experience, license(s), certification(s) and competencies (knowledge, skills, abilities, and behaviors) you believe are required to perform this position. In the case of reclassification, complete this section with the qualifications as if the position were to be posted, not necessarily what is the incumbent’s experience.

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| **Basic/Required Qualifications:**  **Additional/Preferred Qualifications:** | | | | |
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| **If a degree is listed as a basic requirement, how is it relevant to the job responsibilities?**  **What other skills and experience are required to perform this position?**  **Please review and check any boxes that apply to this job.**  **Criminal Screen**  *Will the employee have:*  Unsupervised key access to dorms, valuable artifacts, drugs, radiological materials, or animal care facilities  Supervision of minors (under age 18) in the regular course of duties  The ability to disrupt or disable highly sensitive or confidential data or systems  Access to aggregate credit card data and / or High Risk Confidential Information\* (as defined in Harvard’s Security policy <http://policy.security.harvard.edu/view-data-security-level>).  Will serve as a responsible adult as defined by Harvard’s minor’s policy  The ability to authorize and/or approve financial transactions of $50,000 or more  **Credit Screen**  *Will the employee have:*  Access to aggregate credit card data  The ability to authorize and/or approve transactions of $50,000 or more  Provides a detailed report of an individual’s credit history as prepared by a credit bureau  **License Verification**  *Does this position require a specific license (e.g.* Drivers, professional or technical)*?*  Yes*.* Please specify required license:  No  **\*** High Risk Confidential Information (HRCI) means an individual’s name together with any of the following data about that individual: social security number, bank or other financial account numbers, credit or debit card numbers, driver’s license number, passport number, other government-issued ID numbers, biometric data, health and medical information, or data about the individual obtained through a research project.  General practice prohibits the University from conducting background screens for HUCTW members transferring from one position in the bargaining unit to another HUCTW position. | | | | |
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# Section 11: Comparable Positions

If applicable, please indicate any positions (including brief description and title) within your department, FAS or another Harvard entity that you believe are comparable to this position:

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# Section 12: Comments and Signatures

## Employee Comments:

Please provide any further comments you have about your position and request for review:

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| Employee |  | Date |

## Manager/Department Administrator’s Comments:

Please provide any additional comments about information provided on this form:

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Please indicate which statements below reflect your assessment of this classification request:

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| I agree with the content of this form |
| I support this request for reclassification/classification review |

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| Manager |  | Date |

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| Department Administrator |  | Date |