Customer Advisory Job Aid

DEFINITION: An Advisory is performed at the request of you, the Customer. Advisories are an unofficial classification request. This type of request is used when you need substantial help in writing or developing a PD. It may also be used when you are considering creating a new PD or reclassifying a PD and you would like to see the results first. It is like a preliminary classification.

NOTE: The purpose of an Advisory is not for the classification specialist to write the position description. That responsibility lies with the customer. The specialist is available to assist and provide recommendations and examples.

ADVISORY STEPS

☐	**Step 1:** The manager submits the draft PD to ESBClassification@fiscal.treasury.gov written in the Factor Evaluation System (FES) format for non-supervisory positions and the General Schedule Supervisory Guide (GSSG) format for supervisory positions. In the request, please include an organizational chart, organization mission statement and the reason for this advisory request.
☐	**Step 2:** The ARC Specialist will reach out to schedule a strategic conversation.
☐	**Step 3:** The ARC Specialist completes a preliminary review of the draft PD, organizational structure, and any other relevant information and conducts a strategic conversation with the manager**.** During the strategic conversation, be prepared to discuss the reason the action was submitted as an advisory and provide all information that is pertinent to the situation. The specialist will ask questions and obtain information needed to proceed. Be sure to have all requested documents submitted to the specialist prior to the strategic conversation.
☐	**Step 4:** The specialist will then evaluate the PD against the OPM Classification Standards in order to determine the unofficial title, series and grade. Track changes will be used on the position description to document any updates or comments.
☐	**Step 5:** The specialist will email an updated version of the PD to the hiring manager for review and approval. Note: If the position does not meet the desired title, series, or grade revisions may be made if applicable, you may proceed as evaluated or the advisory action may be cancelled.
☐	**Step 6:** Advisory Complete.

Follow-Up: Once the advisory portion of the process has been completed, the customer will need to submit the PD as a New Classification action with the following steps:

- Login to HR Connect and select ESTABLISH NEW POSITION. (This option is located at the bottom of the page under the "Positions" heading) and include the draft PD.
- Include the name of the specialist who assisted with the advisory. The specialist will then be able to quickly process the formal classification request.