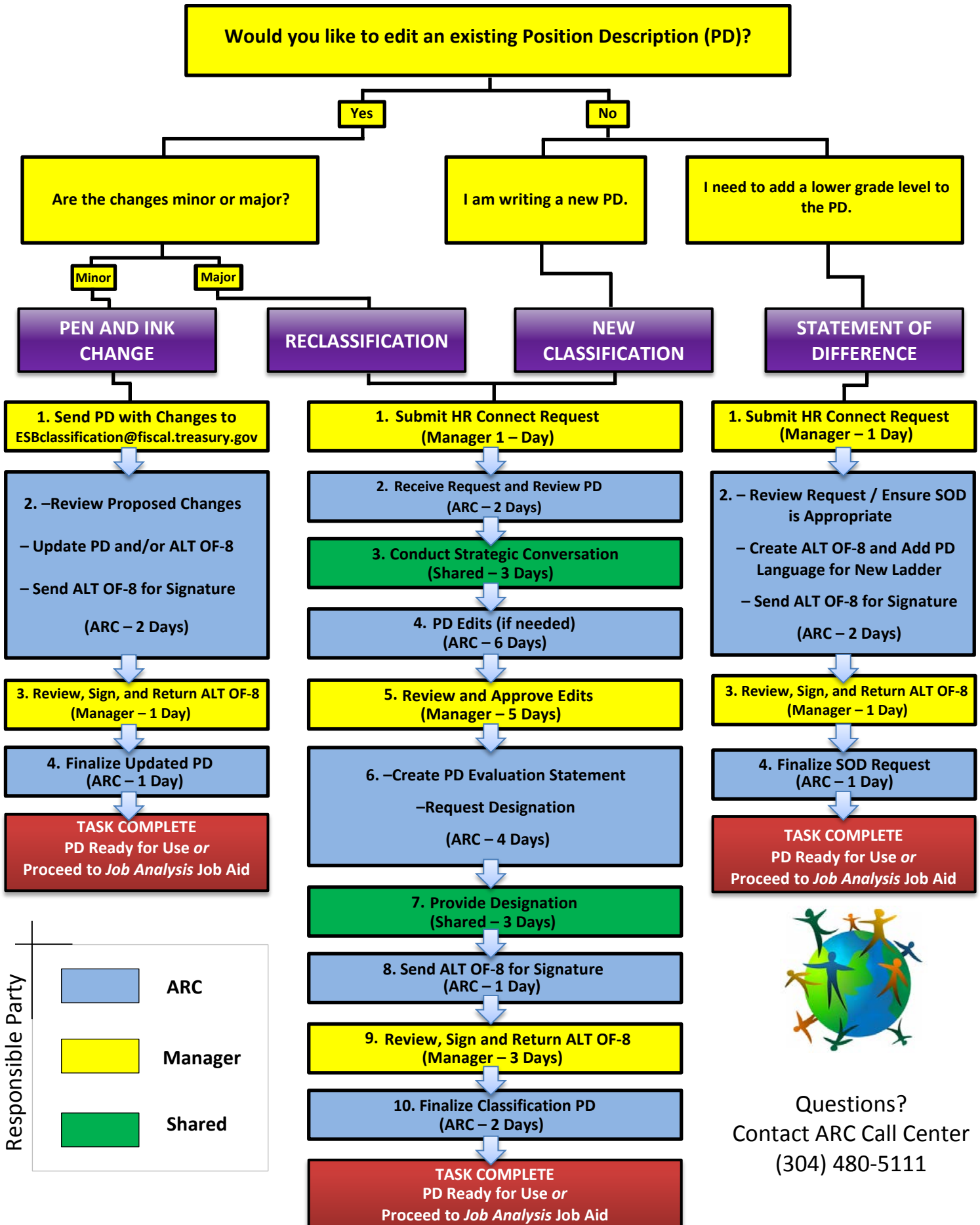


Classification Job Aid



Pen and Ink	Responsible Party	Business Days	Definitions
1. Send Position Description (PD) with Changes to ESBClassification@fiscal.treasury.gov Manager will e-mail the PD, with changes, to ARC. Be sure to utilize the "Track Changes" feature in MS Word when submitting your modified PD. The subject line of your email should be in the following format: "Pen and Ink Request for PD # [insert PD #], [Insert Agency Name]"	Manager	1	Pen and ink changes are very minor changes to a position description that would not have a potential impact on the title, series or grade of the position. Pen and ink changes are not evaluated, nor do they result in a new PD. The PD is simply changed, and the records are updated.
2. Review Proposed Changes: ARC will review the proposed changes and determine if the action is, in fact, a pen & ink change or a reclassification. <i>If it is determined that the action is a reclassification, ARC will change the request to follow the Reclassification process as described below (beginning with step 2).</i> - Update PD and/or ALT OF-8: ARC will update the PD and ALT OF-8 to incorporate the requested changes. - Send ALT OF-8 for Signature: ARC will send the ALT OF-8 and updated PD, via email, to the manager for review and signature.	ARC	2	
3. Review, Sign, and Return ALT OF-8: The manager will review, sign, and return the ALT OF-8 to ARC.	Manager	1	
4. Finalize Updated PD: ARC will update applicable systems to include the final PD and will send a copy to the manager.	ARC	1	
Task Complete: PD Ready for Use	TOTAL	5	
Reclassification or New Classification			
1. Submit HR Connect Request: Manager will login to HR Connect and select <i>ESTABLISH NEW POSITION</i> . (This option is located at the bottom of the page under the "Positions" heading.) Be sure to include a draft PD which contains an introduction, listing of major duties, and factor level descriptions. For further instructions regarding the proper PD format, please email: ESBClassification@fiscal.treasury.gov	Manager	1	A reclassification action takes place when an existing position description (PD) is changed/edited significantly enough that the specialist must evaluate it again for impact on the title, series or grade. A reclassification action results in a new PD, and the existing PD is abolished after any incumbents are reassigned to the new PD.
2. Receive Request and Review PD: ARC will conduct a preliminary review of the draft position description, organizational structure, and any other relevant information in preparation for a strategic conversation with the manager.	ARC	2	
3. Conduct Strategic Conversation: ARC will conduct a strategic conversation with the manager to obtain all information needed for the classification of the PD (e.g. background information, organizational structure, clarification of duties and responsibilities, etc.)	Shared	3	
4. PD Edits (if needed): ARC will evaluate PD against the OPM Classification Standards in order to determine the official title, series and grade. ARC will then edit the PD to reflect information discovered through the evaluation process and strategic conversation. Finally, ARC will send the edited PD to the manager for review and approval.	ARC	6	
5. Review and Approve Edits: Manager will review the edited PD and provide approval to ARC	Manager	5	
6. Create PD Evaluation Statement: ARC will create the PD Evaluation Statement to document the final classification determination. - Request Designation: Request bargaining unit, financial disclosure, and sensitivity designations for the PD.	ARC	4	A new classification is an action used to establish a new PD.
7. Provide Designation: Determine position designation and provide them to the requesting ARC HR Specialist.	Shared	3	
8. Send ALT OF-8 for Signature: Complete the required fields on the ALT OF-8. Email the ALT OF-8 to the manager for signature. If the PD has been placed on hold, the manager will not receive the ALT OF-8 for signature until executive approval has been received.	ARC	1	
9. Review, Sign and Return ALT OF-8: The manager will review, sign, and return the ALT OF-8 to ARC.	Manager	3	
10. Finalize Classification/PD: ARC will update applicable systems to include the final PD and will send a copy to the manager.	ARC	2	
Task Complete: PD Ready for Use	TOTAL	30	
Statement of Difference			
1. Submit HR Connect Request: Manager will login to HR Connect and select <i>ESTABLISH NEW POSITION</i> . (This option is located at the bottom of the page under the "Positions" heading.) Search for the PD that you wish to modify by Pay Plan, Occupational Series, Grade, Position Title, or PD#. Click on the desired PD. Click on <i>"MODIFY this Position Description for my new position."</i> Finally, indicate the grade levels that you wish to add in the either the "Major Duties" or "Comments" sections.	Manager	1	A statement of difference is an action used for the creation or expansion of a career ladder position.
2. Review Request/Ensure SOD is Appropriate: ARC will review the proposed changes and determine if the additional grade levels are appropriate. ARC will then prepare a Statement of Difference (SOD) for each additional grade level. - Create ALT OF-8 and Add PD Language for New Ladder: ARC will update the ALT OF-8 and the PD to include the new career ladder structure. - Send ALT OF-8 for Signature: ARC will send the ALT OF-8 and updated PD, via email, to the manager for review and signature.	ARC	2	
3. Review, Sign, and Return ALT OF-8: The manager will review, sign, and return the ALT OF-8 to ARC.	Manager	1	
4. Finalize SOD Request: ARC will update applicable systems to include the final PD and will send a copy to the manager.	ARC	1	
Task Complete: PD Ready for Use	TOTAL	5	