The Position Evaluation Request Form (PER) is a form that was designed to be used in the position evaluation process. This new form replaces the former Job Information Questionnaire (JIQ), Position Approval Memo (PAM), and the Position and Search Administrative Approval (PSAA).

The Position Evaluation Request Form is a formal document that summarizes the important functions of a specific position, using clear and concise language. It should identify the five to seven key duties and responsibilities, the percentage of time spent on each, and specific position requirements. The Position Evaluation Request Form will be used to help classify the position into the correct pay band, as well as to determine title and appropriate compensation.

General Instructions: This form is to be completed in its entirety to request any new PINs and conduct a search, conduct a search to fill an existing vacant PIN, or re-classify occupied PINs. Completed PER forms should be submitted to HRComp@syr.edu. HR will review the submitted form and work with the department to finalize all aspects of the position evaluation. The submission of the name(s) on Page 4 of the form will be considered as electronic signatures. Once the information included in the PER form is agreed to collectively by the department administrator and HR, it will be submitted by the department to its Executive Team Member, Dean (Designate), and/or Academic Administrator for approval (Page 1). Only Page 1 then needs to be submitted for Vice Chancellor & Provost and Executive VP & Chief Financial Officer approvals.

If you are making department changes, reporting changes, chart string changes, or a decrease in FTE (Full Time Equivalent) this form does not need to be completed. For these types of changes, please send an email to HRComp@syr.edu to request the change. If increasing from part-time status to full-time status or requesting a title change please complete the first page of the PER form with approvals and email to HRComp@syr.edu.

Components of the Position Evaluation Request Form (PER):

Page 1 of the PER form:

Position Identification Number (PIN) Information: Indicate if this is a new PIN or if it is an existing one. If a PIN already exists, select if it is active or inactive and if vacant or occupied. Include position title; title should appropriately describe the nature and level of work performed and should not be inflated.

Request: Select all check boxes that apply.

Request Justification/Proposed Job Description: Four to five sentences summarizing the primary function and general purpose of this job. What is listed here will be used for the job posting, if applicable. It may be helpful to write the proposed job description after defining the major responsibilities of the position as well as the percent of time spent performing them.

Examples of two different job descriptions:

1. Position is responsible for performing a variety of professional and administrative duties that facilitate the day-to-day operations of a function, program, and/or department. Assists in program planning and development; interprets, monitors, and analyzes information regarding operating policies and procedures; administers budgets; and coordinates academic and/or staff personnel matters. Resolves problems that have a significant impact on the overall goals of the department.
2. Position supervises accounting and clerical staff performing specialized or general accounting, statistical, or finance-oriented functions. Provides training and development of newly assigned or less experienced personnel. Provides for the accumulation of data and the preparation of financial reports, special projects, and analyses as needed. Advises management regarding the effective use of resources and methods to maximize earnings.

Financial Implication of Request and Funding Source: Indicate if funds are in the current budget or, if not, where the funds will come from. Indicate funding source.

Approvals: Executive Team Member and Dean (or designate) approvals should be obtained prior to sending completed PER form to Human Resources. Vice Chancellor/Provost and Executive Vice President/Chief Financial Officer approvals should be secured after Human Resources and the department have finalized all aspects of the PER form.

Page 2 of the PER form:

Major Job Responsibilities and Percent of Time: Identify five to seven major responsibilities that account for at least 5% of the position. Describe the responsibilities by what is to be accomplished, how, and why. Use **action verbs** to begin each sentence. List them in descending order of importance and indicate the percentage of time spent on the duties. You do not need to list every task performed; this should highlight the major responsibilities of the job. Use clear and concise language; closely related duties should be grouped together in one responsibility statement.

> **Example:**
> *(Incumbent=person in the roll)* evaluates *(action verb)* jobs *(what)* and prepares or revises *(action verbs)* job descriptions *(what)*. - 40%.
>
> For assistance, please see the list of **sample statements** in writing the essential responsibilities of the job.

Specialized Knowledge and Skills: Describe the level of technical/professional knowledge and key skills needed to successfully perform the work of the position.

Problem Solving: Select the check box that best defines the problem solving skills needed to successfully perform the work required of the position.

Problem Solving Decision Impact: Select all check boxes that apply.

Page 3 of the PER form:

Management Oversight and Direction: Select the check box that best defines the management oversight and direction needed to successfully perform the work required of the position.

Management Scope: Indicate the number of staff in your department within your unit by Exempt and Non-Exempt Status as well as how many of each are direct reports.

Page 3 of the PER form:

Education and Experience: Indicate the minimum education and experience required or preferred to perform the work. Include specific professional designations, licenses, registrations, etc. required.

Examples of Education and Experience:

Requires a bachelor's degree or equivalent plus 2-3 years experience in accounting procedures.

Requires 2-3 years of relevant experience.

Individual has 3-5 years of experience in the field. Degree requirement: ALA   Accredited Master's.

Metrics: Indicate the amount of funds the position is responsible for and the level of authority over the indicated funds.

Travel Requirements: Indicate the type and amount (%) of travel required for individuals in this position. For example: local travel, intermittent out of state travel, etc.

Additional Information: Anything additional that is key to the position and has not already been indicated.

Page 4 of the PER form:

Position Data (Former PAM information): Complete as much position data as possible. Human Resources will review and discuss any missing information and/or questions with the person who is submitting the form.

Page 5 of the PER form:

Compensation Data (HR Use Only): Human Resources will complete this section of the form and return. This information is for administration only and should not be distributed to employees.

You can find the PER form, instructions, and other useful information on the Position Evaluation Procedures page.