

## **Position Classification and Reclassification Checklist**

- Questions to answer before submitting requests
  - ❑ Is there an existing vacant item already classified in the title? Check NYSTEP reports.
  - ❑ Are any other positions in the same title earmarked? Why?
  - ❑ How will this action affect other positions in the immediate work unit or elsewhere in the organization?
  - ❑ If the item is filled, is the incumbent eligible for appointment to the new title?
  - ❑ Has a position previously been classified to perform the same duties? If so, where is it currently assigned?
  - ❑ Do you have fiscal approval and/or a freeze waiver?
  - ❑ Review “Elements Not Considered as Classification Factors”
  
- New Position Requests: to establish a position in an existing title or in a proposed new title
  - ◆ Short Form (pre-approved titles): Use form 1A on NYSTEP and include “Comments;” prepare the “Reviewable Record”
  
  - ◆ Long Form (existing title or requested new title): Use form 4N on NYSTEP and attach:
    - Justification: Why the action is requested, Program description
    - Duties Description: What the incumbent will do
    - Minimum Qualifications (as needed)
    - Organization Chart: Where the position exists in the organization
  
- Reclassifications: to change title and/or salary grade of a position to an existing title or a proposed new title
  - ◆ Short Form (pre-approved titles): Use form 2A on NYSTEP and include “Comments;” prepare the “Reviewable Record”
  
  - ◆ Long Form (existing title or requested new title): Use form 4R on NYSTEP and attach same documents as noted in “Long Form” above.
  
- Resources
  - ◆ Classification Standards
  - ◆ Job Audit (if position is filled)
  - ◆ Personnel Office files
  - ◆ Program Managers, Supervisors
  - ◆ Colleagues in other Personnel Offices
  - ◆ Technical Assistance from C&C Analyst