

**APPEAL OF POSITION CLASSIFICATION FOR EMPLOYEES COVERED
BY UWOSA COLLECTIVE AGREEMENT
(Reference Collective Agreement Article 44)
Attention: Job Evaluation Appeals Committee**

(A) Contact Information:

Name of person requesting appeal: ELLA MARYNOUSKI
Title: Clerk III
Phone: 661-211 ext. 85495
Email: emarynow@uwo.ca
Department: Finance, Accounts Payable

(B) Position Information:

Current Incumbent: Ella Marynowski
Current Classification: Clerk III
Classification Being Appealed: Clerk IV
Date Evaluation Results Letter Received: June 11, 2001

(C) Information Required For Job Evaluation Appeals Committee:

Reason for the appeal: See the attached page

Supporting Information (Optional): _____

(Attach an additional page if more space is required)

(D) Approvals:

Signature of Person Appealing: [Signature] Date: June 14, 2001

Please forward form to JEAC c/o Department of Employee Relations, Room 262, SLB

FOR EMPLOYEE RELATIONS DEPARTMENT USE ONLY:

applicable, copies of this form have been forwarded to the following:

Employee

Dean (or designate)

Supervisor

Budget Unit Head (or designate)

UWOSA

Reasons for the appeal:

I am **responsible for paying incoming invoices** in an **efficient manner** using the **PeopleSoft software system**, as well as resolving problems in this regard, which occur on daily basis. **Solving problems** and making right **decisions** is my sole responsibility, and my work is **not directly supervised** (except trainings and meetings). I must **detect errors** that occur **in the PeopleSoft software system** while processing invoices and then make a decision on how to deal with these problems. Also, my responsibility involves **managing problems that occur in invoices and purchase orders**.

Furthermore, the work that I am performing requires very **strong mathematical accuracy** and **ability to deal with numbers** in a very efficient manner. In addition, in order **to meet strict deadlines**, I must be very **well organized**.

Moreover, to **communicate with Purchasing Managers, Buyers, Tax Analysts, Administrative Assistants** of all the UWO's departments, and **Vendor Administrative Staff** I must possess very good **communication skills**.

I am also involved in **training** temporary employees.

Please, kindly review my position classification.

Diapoulos

June 14, 2001

General Accounting currently has two Clerk IIIs and one Clerk IV in our Accounts Payable area. The three positions are identical, in that the primary function is the shared entry of invoices for remittance to vendors. The Clerk IV position has the identical duties of a Clerk III with the additional responsibility, of printing cheques for the Fees, Payroll, Bookstore and Accounts Payable areas. This task demands additional knowledge because of security and confidentiality issues.

The Accounts Payable Clerk III incumbents are supervised directly by the Accounts Payable and Travel Supervisor(PMA), and are assisted in organizing their daily workload by the Accounts Payable Coordinator(SG10). The Accounts Payable Coordinator will specify the Emergency and rush order, while handling the daily invoice inquiries, forwarded from the clerks. The Accounts Payable Clerk III are assisted by work study students. The students are trained by the Supervisor of Accounts Payable and Travel, however straightforward questions are generally directed to any of the Accounts Payable Clerks.

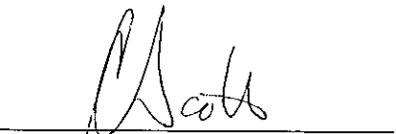
The present Accounts Payable Clerk III positions are primarily responsible for the entry of invoices into the PeopleSoft Financial Module. Any matters regarding invoices correction, account inquiry and decision making are handled by either the Accounts Payable Coordinator or directly by the Accounts Payable Supervisor. The Accounts Payable Clerk III may detect potential invoice errors, however due to the complicated nature of the Goods and Services Tax, Provincial Taxes and the PeopleSoft Financial System, they are responsible for forwarding errors to the appropriate areas. The Accounts Payable Clerk III positions do not have journal access to correct account error because of an insufficient background in accounting and their limited knowledge of the PeopleSoft System.

The clerks are responsible for minimizing data entry errors and adapting the Payable procedures to accommodate their own strengths and weakness. Errors created from PeopleSoft software problems are handled by the Accounts Payable and Travel Supervisor and the General Accounting Systems Manager. The incumbents have limited communications with the Purchasing Manager and Tax Analyst. They deal with purchasing buyers and administrative assistants on a regular basis, referring problems or inquiring on invalid speedcodes.

The Clerk III position demands mathematical and keyboarding proficiency, and the ability to withstand repetitious and exacting work procedures. The Clerks are required to maintain a minimal backlog through the year and have all invoices entered for the April 30 yearend (not a strict deadline).



A/P Supervisor



Controller

UWOSA JOB EVALUATION RECORDING FORM

Office Support Plan

(APPEAL)

Dept: Finance - Accounts Payable
Dept. Num.
Incumbent: Ella Marynowski
Citite Mem.Present: UWOSA: M. Broadfoot, D. Hassall, J. Sparks
 ADMIN: C. Bumbacco, S. Demaray, C. Zrini

Job Title: Clerk 3

Eval. Date: July 4, 2001

I	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge	Full Vocational. Generally regulated - one or two years of experience	Educ	2	45			
			Exper.					
II	Initiative	Routine - refers problems to others		2	20			X
III	Complexity/Judgement	Standardized. Decisions affect quality/accuracy of work		3	25			X
IV	Contacts	Routine within UWOSA. Factual information outside		2	20			X
V	Errors	Awkward. Procedural errors causing delays in related and succeeding operations.		3	45			X
VI	Supervision of Others	None on PDQ	Char.	1	5			
			Scope					X
VII	Effort/Demands	Less than usual variety. Moderate sensory attention		2	30			X
VIII	Physical Environment	Agreeable - office						
				1	10			X

CLASSIFICATION ASSIGNED

Total Pts: **200**

Group: _____ Clerical _____

Level: _____ 3 _____

Co-Chair Signatures: UWOSA: J. Sparks _____

ADMIN: C. Bumbacco _____

**POSITION DESCRIPTION
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO
EMPLOYEE RELATIONS**

5.01

U.W.O. ID NUMBER _____ PRESENT INCUMBENT SURNAME Marynowski INITIALS Ella POSITION IDENTIFICATION DEPT. NO 421040 P.S. JOB CODE SC3

BASIC POSITION INFORMATION

DEPT. NAME Finance Department

SECTION NAME Accounts Payable

LOCATION Rm 280 SLB

WORK WEEK HRS. 35 hours / week

SUPERVISOR SURNAME Brand INITIAL H.A. PHONE x 85497

FOR SALARY ADMINISTRATION USE			
CLASS'N	<u>Clark 3</u>		
CLASS'D	<u>June 1st</u>	EFFECT	<u>N/C</u>
	Date		Date
ANALYST	<u>J. Chute-Dolan</u>		

1) PLEASE LIST AND DESCRIBE YOUR MAJOR DUTIES WITH AN APPROXIMATE ANNUAL PERCENTAGE OF TIME SPENT ON EACH. USE SPECIFIC TERMINOLOGY PERTINENT TO THIS POSITION; PROVIDE EXAMPLES (E.G. TESTS, PROCEDURES, ETC.) AND CLARIFY YOUR INVOLVEMENT IN EACH DUTY (RE. SUPERVISE IT, DO IT, PARTICIPATE IN IT, ETC.)

NO.	MAJOR DUTIES	%
1)	Enters the daily invoices into the Account Payable PeopleSoft module. Ensures invoices are entered according to the applicable priorities (Payment Terms) and that all requirements for correct payment have been met as well as maintaining an acceptable monthly invoice production average	
2)	Corresponds with the Buyers, Tax Analyst, Customs and Traffic Officer and Administrative Assistant by telephone and e-mail concerning invoice and purchase order discrepancies. Referral items include: i) Invoices that disagree with P.O. either in description, quantity or add on items ii) Federal Sales Tax variance iii) No price variance iv) Missing account number or speedcode v) Invoice exceeds the commitment guidelines vi) Accounting remit to address requires corrections, additions or set-up	
3)	Handles minor system problems, corrects entry errors of incorrect payment terms, payment dates and account/speedcode errors	
4)	Matches the daily receipts of suppliers invoices, credit notes and release for shipment forms to the appropriate payable copy of the Purchase Orders held in the individual tubs	

NO.	OTHER DUTIES (less than 10%)
1)	Corresponds with suppliers accounts receivable i) Invoices that are unidentifiable ii) Incorrect extension or addition on invoices iii) Outstanding invoices not received by Accounts Payable
	Resolves discrepancies between invoices and Purchase Orders, correct distribution of funds for multiple account numbers and/or proper identification of P.O. when the P.O. number is omitted or invalid by searching for the proper P.O. number on the inquiry screens
3)	Files daily on an average of approximately 30 new Purchase Orders and partially completed P.O. 's

- 4) Removes all staples from the Purchase Order/Release invoice and any relevant correspondence after the invoice has been entered and records the voucher number on invoice

Update the purchase order for name changes, cancellations, account numbers and re-keyed order numbers
- 6) Records on the original and departmental copy of the entered invoices the Voucher number. Then writes the applicable account number(s) from the computer system onto the Department copy of the entered invoice
- 7) Writes the voucher number, batch number and current date on the batch cover and fastens all the entered documents to the back of the batch cover, neatly and in numerical order. Then files the batch in the office services files
- 8) Puts correct cheque-handling codes on vouchers and makes the appropriate enclosure copies for cheques. Then files the enclosures invoice copies to be matched to cheques
- 9) Answers telephone inquiries with Faculties/Departments and vendors regarding invoice problems, inquiries or invoice referrals
- 10) Retrieves and photocopies entered invoices and Purchase Orders from files in Office Services, searches and reads microfilm to resolve additional charges or answer inquiries
- 11) Assists the Accounts Payable Coordinator with specific assigned duties while on vacation, during illness or during extra heavy volumes and interruptions
- 12) Inputs messages on the voucher comment panel regarding special handling or any problems with the voucher

Answers telephone inquiries with Faculties/ Departments and vendors regarding invoice problems, inquiries or invoice referrals
- 14) Completes the weekly Purolator uploads, resolving invalid and missing account numbers and any amount discrepancies.

2) PLEASE COMPLETE THE FOLLOWING TABLE CONCERNING STAFF MEMBERS WHO REPORT **DIRECTLY AND FORMALLY** TO YOU.

Classification/Rank (eg. Clerk I)	RF/RP Pos'n No.	For CW or TM Staff-employed		Responsible for (eg. Filing records...)
		From (month)	To (month)	

N/A

3) PLEASE CHECK THE SUPERVISORY DUTIES WHICH YOU PERFORM **REGULARLY**.

- Training and guidance for new employees
- Work distribution and/or verification of results
- Performance review and salary recommendations
- Hiring and firing; please describe the degree of your involvement:

4. IF YOU COMPOSE (originate) WRITTEN MATERIAL, PLEASE COMPLETE THE FOLLOWING TABLE:

Type of Composition	Method of Composition	Brief Description of Content
Correspondence: <input checked="" type="checkbox"/>	X <input type="checkbox"/> Complete Composition <input type="checkbox"/> Partial composition with general direction (verbal or written) <input type="checkbox"/> Prescribed format	-Composes explanatory notes for invoices both for referrals and computer screens -Enter messages and send emails
Reports: <input type="checkbox"/>	<input type="checkbox"/> Complete composition <input type="checkbox"/> Partial composition ... <input type="checkbox"/> Prescribed format	
Other: <input checked="" type="checkbox"/> Forms	<input type="checkbox"/> Complete composition <input type="checkbox"/> Partial composition ... <input type="checkbox"/> Prescribed format	-Request invoices from vendors -Return invoices that require further information to the vendors and Departments

5) WHAT ARE THE **MINIMUM** SKILLS, EDUCATION, SPECIAL TRAINING AND/OR EXPERIENCE **REQUIRED** TO PERFORM SUCCESSFULLY THE DUTIES OF THIS POSITION?

- i) Secondary School graduate with enrollment in post-secondary accounting courses
- ii) Previous experience in an Accounts Payable or an Accounting Office using a computerized accounting system or an Accounts Payable on-line system
- iii) Typing and keyboarding skills with accuracy
- iv) Mathematical accuracy
- v) Proficiency in operating and inputting data on a computer with the ability to produce high volume of accurate work
- vi) Ability to withstand high volume of repetitious and exacting work procedures
- vii) Ability to compose brief concise easily understood messages on a computer and electronic mail.
- viii) Strong organizational ability
- ix) Ability to work under pressure and time constraints
- x) Working knowledge of Excel, Word, Lotus 1-2-3 and Word Perfect programs

6) PLEASE DESCRIBE THE **NATURE AND FREQUENCY** OF THE SUPERVISION YOU RECEIVE.

Except for the initial training sessions or need to deviate from normal procedure, work is not directly supervised. Daily advice and direction from the A/P Co-ordinator when required on how to deal with resolving invoice problems, correction of errors and when having difficulty entering the invoices into the PeopleSoft system. Random checking by the Supervisor and A/P Co-ordinator are done to ensure procedures are followed and back-logs are avoided.

7) WHAT TYPES OF PROBLEMS OR INQUIRIES ARE YOU EXPECTED TO DEAL WITH ON YOUR OWN?

- i) Precise selection of the appropriate remit to Vendor code. Accurately checking the payment address
- ii) Precise selection of appropriate funds
- iii) Accurately determining the correct payment date
- iv) Precise selection of the correct cheque handling code. Accurately following the special cheque handling instructions
- v) Precise entering of invoice date, invoice number, discount if applicable and invoice amount
- vi) Accurately checking invoice items against P.O. or Release and when there is a difference in description terminology
- vii) Accurately distributing funds for multiple account numbers
- viii) Precise selection of appropriate code for sales tax discrepancies
- ix) Accurately checking invoice copies for duplicate payments and ensuring balance forwards are not paid on invoice statements
- x) Accurately following the set referrals parameters and ensuring that exacting procedural instructions are observed and followed while entering invoice into the PeopleSoft system
- xi) Following through on inquiries or invoice referrals using discretion
- xii) Knowing when to refer problems to Accounts Payable Coordinator

8) WHAT TYPES OF PROBLEMS OR INQUIRIES MUST BE REFERRED TO ANOTHER SOURCE FOR SOLUTION?

- i) When invoice problems of an unusual nature are too difficult to resolve
- ii) When inquiries cannot be answered promptly and efficiently or are outside my area of responsibility
- iii) Workload in excess of time available
- iv) When own errors are too difficult to resolve and correct
- v) Any correcting journals for account errors or tax errors

9) WHAT ACTIVITIES DO YOU PLAN OR ORGANIZE? PLEASE INDICATE THE LENGTH OF TIME INVOLVED (e.g. daily planning of assigned work, monthly ...)

Daily planning and organization of work as controlled by invoice priorities and volume. (approximately 15 min. per day)

Unmatched invoices and problems are followed up on a weekly basis using discretion on what action to take

10) PLEASE COMPLETE THE FOLLOWING TABLE CONCERNING YOUR **MOST IMPORTANT** CONTACTS (in person, by telephone, or in writing). PLEASE EXCLUDE CONTACTS WITH YOUR SUPERVISOR AND YOUR SUBORDINATES. INCLUDE GROUPS AS WELL AS INDIVIDUALS.

CONTACT'S TITLE (e.g. Purchasing Agents)	LOCATION (inside outside) dept dept	FREQUENCY (dly wkly mthly)	PURPOSE OF THE COMMUNICATION (e.g. to provide information concerning...)
Purchasing Control Desk	Outside	Daily	- Resolve vendor and Purchase Order Problems
Dept. Administrators	Outside	Daily	- Resolve invoice problems and assist with inquiries
Department Secretaries	Inside/Outside	Daily	- Resolve Invoice and P.O. problems.
Tax Analyst	Outside	Weekly	- Referrals of invoices that differ to Purchase order tax codes
Com & Traffic Officer	Outside	Weekly	- Resolve invoice and P.O. problems
Purchasing Buyers	Outside	Weekly	- Resolve P.O. problems
Suppliers	Outside	Daily	- Resolving inquiries on payments and invoices

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POSITION DESCRIPTION
QUESTIONNAIRE

THE UNIVERSITY OF WESTERN ONTARIO
EMPLOYEE RELATIONS DEPARTMENT

PURPOSE

MAR 5 2001

University Personnel Policy requires the maintenance of up-to-date job information on all staff positions for use in job evaluation and other programs (e.g. staffing, orientation, etc.) This form is designed to encourage direct participation by the staff member in providing information about the position. Your co-operation in completing the attached questionnaire is appreciated.

B. USE

This Questionnaire **must be used** to describe all staff positions covered under the U.W.O. Staff Association. Should you require assistance in completing this form, contact Salary Administration at extension 82198.

C. INSTRUCTIONS

1. The information must be authorized (signed & dated) by both the staff member, the immediate supervisor, and the Dean or Director before it is forwarded to the Salary Administration in Employee Relations Department.
2. The following table may be helpful in determining annual time percentages:

1 hr/day (14%)	1 day/week (20%)	1 day/year (0.4%)
1 hr/week (3%)	1 day/month (4.5%)	1 week/year (2%)
3. If necessary, please attach an extra page for additional information which you feel is required to provide a complete understanding of your position.

D. NOTES

1. A change in duties and/or responsibilities does not automatically imply a change in classification and salary.
2. A job description is not intended to measure an increase in the volume of work; rather it should only reflect the areas of responsibilities and the nature of duties.

Please complete below and forward with the Questionnaire.

Reason(s) for requested review

- Classify new position
- Change in responsibilities
- Check current classification
- Update your records

Routing approvals: I agree that this review is required

- Immediate supervisor Heather Brand
- Department Head [Signature]
- Dean's Office [Signature]
- Date Feb. 15/01