

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

MAR 31 2005

(A) Contact Information:

Name of person requesting appeal: JUDI CUNNINGHAM
Title: ACCTS PAYABLE/ACCTS RECEIVABLE CLERK
Phone: 85486
Email: jcunning3@uwu.ca
Department: SPORTS & RECREATION SERVICES

(B) Position Information:

Current Incumbent: JUDI CUNNINGHAM
Current Classification: CLERK IV
Classification Being Appealed: CLERK IV
Date Evaluation Results Letter Received: MARCH 18/05

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal: HAVING SEEN SEVERAL POSITIONS ON
CAMPUS ADVERTISED AT SALARY GRADE 10, I AM VERY
SURPRISED THAT THIS POSITION IS STILL BEING EVALUATED
AS A CLERK IV. ON THE FLIP SIDE, KNOWING OF
OTHER POSITIONS ON CAMPUS THAT ARE CLERK IV'S, IT
SURPRISES ME THAT THIS POSITION IS DEEMED TO
BE IN THE SAME CATEGORY.
PLEASE ADVISE.

Supporting Information (Optional):

220 +

(Attach an additional page if more space is required)

(D) Approvals:

Signature of Person Appealing: J. Cunningham Date: Mar. 31/05

The appellant shall send one copy of the material to Human Resources and one copy to JEAC c/o UWOSA.

Subject: Job Description Clarification - Cunningham

Date: Tue, 05 Apr 2005 09:53:35 -0400

From: Sean Wheatley <swheatle@uwo.ca>

To: "Chute-Dolan, Donna" <perdec@uwo.ca>

Hi Donna,

As per your request, here is clarification on the following points in the job description for Judi Cunningham's appeal;

Generate and reconcile payroll deduction report and submit to payroll for over 300 employees per month.

- generate only new employee for payroll deduction each month
- reconcile payroll deduction report for over 300 employees/clients and submit each month

The AP/AR Clerk is required to provide back-up for the Financial Officer when absent for processing purchase orders and invoices, etc.

- in the event the financial officer is absent the AP/AR clerk would prepare purchase orders but, would not have the financial authority to complete it. For financial authority the AP/AR clerk would need approval from either the SRS Director or Faculty Chief Operating Officer. Therefore the only back-up coverage by the AP/AR clerk would be clerical (preparing) in nature. The job description already refers to processing purchase orders for the Campus Recreation division but in the Financial Officers absence the AP/AR Clerk may have to prepare purchase orders, invoices, etc. for the Intercollegiate Athletics division.

If you have any further questions or points of clarification, please let me know.

Thanks

The University of Western Ontario

Sean Wheatley

Financial Officer

swheatle@uwo.ca

Sports & Recreation Services

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www.uwo.ca/mustangs

Add me to your address book... Want a signature like this?

UWOSA JOB EVALUATION RECORDING FORM

Office Support Plan

(APPEAL)

Dept: School of Kinesiology - Sports and Recreation Services
Dept. Num.
Incumbent: Judi Cunningham
Citite Mem.Present: UWOSA: M. Broadfoot, C. Bender, D. Hassall, J. Sparks
 ADMIN: C. Bumbacco, S. Demaray, V. Smith, C. Zrini

Job Title: Clerk

Eval. Date:

I	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge	Post secondary	Educ	4	115			
			Exper.	E				
II	Initiative	Works independently, routine matters		3	35			
III	Complexity/Judgement	Standardized		3	25			
IV	Contacts	Routine contacts		2	20			
V	Errors			2	20			
VI	Supervision of Others	Incidental	Char.	1	5			
			Scope	Any				
VII	Effort/Demands	Payroll, need to reconcile		2	20			
VIII	Physical Environment			1	10			

CLASSIFICATION ASSIGNED

Total Pts: **250**

Group: _____ Clerk _____

Level: _____ 4 _____

Co-Chair Signatures: UWOSA: _____

ADMIN: _____

**POSITION DESCRIPTION
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO
EMPLOYEE RELATIONS**

U.W.O. ID NUMBER 010016483 PRESENT INCUMBENT SURNAME Cunningham INITIALS J. A. POSITION IDENTIFICATION DEPT. NO _____ P.S. JOB CODE _____

BASIC POSITION INFORMATION

DEPT. NAME Sports & Recreation Services
SECTION NAME Campus Recreation
LOCATION UCC, Room 38
WORK WEEK HRS. 35 hours

FOR SALARY ADMINISTRATION USE	
CLASS'N _____	
CLASS'D _____	EFFECT _____
Date	Date
ANALYST _____	

SUPERVISOR SURNAME Wheatley INITIAL F. S. PHONE 88535

Accounts Payable/Accounts Receivable Clerk

This position is one of three reporting directly to the Financial Officer of Sports and Recreation Services. The incumbent is accountable for accounts payable and accounts receivable department wide. The Accounts Payable/Accounts Receivable Clerk also serves as back-up for the Financial Officer in the event of absence.

- 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	97%
1.	Process purchase orders and receive supplies and equipment for Campus Recreation	
2.	Generate and reconcile payroll deduction report and submit to payroll for over 300 employees per month *	
3.	Process requests for petty cash, cheque requisitions	
4.	Reconcile and journal daily deposits from Membership Services including ticket sales and events ✓	
5.	Maintain 14 different club statements	
6.	Monitor revenue and expenses and ensure adherence to budget for Campus Recreation	
7.	Reconcile and journal daily Ecommerce from Sport Western registration	
8.	Generate invoices and liaison with Accounts Receivable for the Department	
9.	Maintain petty cash of \$250 ✓	
10.	Purchasing/Accounts Payable inquiries	
11.	Serve as liaison for ITS and Telecommunications including distributing monthly statements '	

NO.	OTHER DUTIES (less than 10%)	3%
1.	Other minor duties as assigned by Supervisor	
2.	The AP/AR Clerk is required to provide back-up for the Financial Officer when absent for processing purchase orders and invoices, etc.	

- 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)	

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"/>	<input checked="" type="checkbox"/> Complete Composition <input type="checkbox"/> Partial composition with general direction (verbal or written) <input type="checkbox"/> Prescribed format	<ul style="list-style-type: none"> - UWO staff members paying through payroll deduction - Payroll department regarding deduction inquiries - Suppliers regarding orders
Reports: <input checked="" type="checkbox"/>	<input type="checkbox"/> Complete composition <input checked="" type="checkbox"/> Partial composition ... <input type="checkbox"/> Prescribed format	<ul style="list-style-type: none"> - Payroll department regarding deductions - As required by supervisor
Other: <input type="checkbox"/>	<input type="checkbox"/> Complete composition <input type="checkbox"/> Partial composition ... <input type="checkbox"/> Prescribed format	

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

- Post secondary education
- Knowledge of Microsoft Word, Excel and PeopleSoft
- Basic accounting skills
- Ability to give attention to detail, accurate record keeping, work unsupervised and meet deadlines
- Ability to compile correspondence
- Three years clerical experience
- Working experience in a University environment

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

- Changes in procedures
- New supplier possibilities

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

- Decipher finance problems as requested from Finance Department
- Decipher problems with regard to daily sales
- Inquiries about payroll deductions

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

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

- Organize daily work
- Setting priorities for tasks
- Requesting time deadlines from unit coordinators for purchasing supplies

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)		FREQUENCY (dly wkly mthly)	PURPOSE OF THE COMMUNICATION (e.g. to provide information concerning...)
	dept	dept		
Unit Coordinators	X		daily	purchasing items/provide info on assets
Suppliers		X	daily	order/price supplies/equipment
Club Executives		X	daily	purchases, reimbursement and balance
Accounting Dept		X	weekly	to provide info on accounts
Purchasing		X	weekly	suggested suppliers/ PO info
Payroll Dept		X	monthly	discuss payroll deductions
Customers		X	monthly	discuss payroll deductions

THIS COMPLETED QUESTIONNAIRE IS AN ACCURATE DESCRIPTION OF THE WORK BEING PERFORMED.

Staff Member:

Present Classification CLERK IV Signature J. Lunn Date Jun. 25/05

Supervisor:

Signature [Signature] Date Jun 25/05