

**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: Kathy Dantzer
Title: Administrative Assistant
Phone: 519.850.2904
Email: kathy.dantzer@schulich.uwo.ca
Department: Continuing Medical Education, Schulich School of Medicine & Dentistry

(B) Position Information:

Current Incumbent: Kathy Dantzer
Current Classification: S.G. 10
Classification Being Appealed: S.G. 10
Date Evaluation Results Letter Received: May 2, 2008

(C) Information Required For Job Evaluation Appeals Committee

Reason for the appeal:

I feel that this position has been rated at a lower level than it should be.

The overall content and importance of this position has evolved over the past 4 years. This position requires many contacts between external clients and internal medical faculty with minimal supervision and should therefore be rated at a higher level.

Supporting Information (Optional):

(Attach an additional page if more space is required)

(D) Approvals:

Signature of Person Appealing: Kathy Dantzer Date: May 14/08

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

UWOSA JOB EVALUATION RECORDING FORM

Office Support Plan

(APPEAL)

Dept: Schulich School of Medicine and Dentistry
Dept. Num. 370100
Incumbent: Kathy Dantzer
Citte Mem.Present: UWOSA: K. Foullong, R. Fournier, J. Millette
 ADMIN: J. Asuncion, L. Brock, V. Smith

Job Title: Administrative Assistant

Eval. Date: June 25, 2008

I	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge		Educ	4				
			Exper.		G	165		
II	Initiative			4	55			
III	Complexity/Judgement			3	25			
IV	Contacts	Nature of communication type of communication, relationship with outside personnel?		3	45			
V	Errors	Bullett #10 under 1 - does the Administrative Assistant approve expenses of Associate Dean? - assumed not to be		3	45			
VI	Supervision of Others		Char.	1				
			Scope	Any	5			
VII	Effort/Demands			2	30			
VIII	Physical Environment			1	10			

CLASSIFICATION ASSIGNED

Total Pts: **380**

Group: Administrative Assistant

Level: Salary Grade 11

Co-Chair Signatures: UWOSA: Jan Millette

ADMIN: Valerie Smith

Committee met twice - initially met on June 25th and made some assumptions during the evaluation then sent some questions back to unit - once these questions were answered then the slotings were confirmed on July 23rd

**POSITION DESCRIPTION
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO
EMPLOYEE RELATIONS**

PRESENT INCUMBENT
SURNAME INITIALS

POSITION IDENTIFICATION
DEPT. NO P.S. JOB CODE

BASIC POSITION INFORMATION

DEPT. NAME SSMD Education Office

SECTION NAME Continuing Medical Education

LOCATION Suite 227, 100 Collip circle

WORK WEEK HRS 35

SUPERVISOR SURNAME Eadie INITIAL J.R. PHONE x82936

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

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	90 %
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- | | | |
|----|---|--|
| 1) | <p>Independently manage day to day finances and human resources administration activities for the CME office according to current operating policies and procedures of the CME office, SMD and UWO (30 %)</p> <ul style="list-style-type: none"> • Initiate, set up and manage multiple CME course project accounts in accordance with Dept. Finance policy • Complete on-line Purchase Orders and other UWO forms for payment of suppliers; investigate and resolve any payment issues or problems. • Resolve financial inquires and issues related to CME programs, e.g. dealing with UWO Purchasing, HR/Payroll, Travel etc. (Signing authority up to \$5,000.00) • Generate Journal Entries in PeopleSoft financials according to UWO financial procedures to ensure that revenues and expenses are posted to the correct Fund 1 and Fund 4 accounts by reconciling reports at the end of each month; • Monitor and provide monthly expenditure reports on all Fund 1 and Fund 4 accounts to Manager, CME to track overall financial performance. • Advising UWO Finance of any incorrect postings; ensure that all adjustment are accurate and timely • Analyze UWO Payroll reconciliation reports (monthly, weekly and off-cycle pays) to ensure appropriate payments are made to faculty and staff as required. Identify any errors and work with UWO HR staff to make necessary corrections, communicate with faculty and staff regarding resolution. • Monitor contract staff timelines and prepare necessary documentation for Manager's approval to ensure no disruption to services (SAN's) • Co-ordinate/complete travel reimbursement forms for Associate Dean and Manager, CME. Ensure appropriate receipts are submitted and request or clarify necessary items. Verify that all payments are received. • Approval of on-line Travel Expense reports for CME Office staff and Associate Dean CME up to \$5,000.00. • Independently co-ordinate/complete and generate invoices in PeopleSoft weekly/daily as per policies/guidelines, provide follow up to ensure timely receipt of payment. • Perform monthly Visa Purchasing Card reconciliation for CME unit and investigate any unidentified charges. • Validate Visa and Mastercard receipts for process deposits to the appropriate Fund 1 or Fund 4 account. • Prepare year end budget summary reports for Fund 1 and Fund 4 accounts to assist with development of rolling 3 year forecasts. • Monitor office supplies and generate PO's to replenish inventory as required. • Reconcile all Fund 1 and Fund 4 accounts on an annual basis at year end. | |
|----|---|--|

- 2) Manage the CME Course Accreditation process from the receipt of applications through to notification of approvals to the national regulatory bodies governing accredited CME. (25 %)**
- Provide expertise to faculty and external organizations regarding the course accreditation process, fees and documentation required.
 - Receive, log and review all incoming program/course accreditation applications from internal and external customers.
 - Provide communication of application deficits within 3 – 5 working days.
 - Track receipt of supplemental documents required for approval.
 - Assess the number of eligible credits.
 - Assess eligibility for accreditation with CME Manager or the Associate Dean, CME and communicate the outcome to the customer.
 - Track and report CME course credit approvals and non-approvals to The Royal College of Physicians and Surgeons of Canada (RCPSC) and The College of Family Physicians of Canada (CFPC) as per current CME accreditation standards and guidelines.
 - Assess and invoice application fees as per the annual fee schedule of the CME office.
 - Track approved and non-approved applications in the internal CME Application Database and paper based filing systems.
 - Track summary evaluations to comply with accreditation guidelines.
 - Track participant lists and ensure confidentiality as per accreditation guidelines.
 - Ensure Schulich School of Medicine & Dentistry branding guidelines are adhered to on all internal correspondence, print materials (letterhead, envelopes, business cards), websites and on programs accredited by the CME office.
- 3) Assist the CME office to develop educational programming by serving as the departmental liaison between external customers and internal faculty. (20%)**
- Promote and advocate CME services to generate new business for the CME Office
 - Receive and log incoming co-sponsorship/co-development or endorsement requests in the appropriate Microsoft Access database.
 - Manage and maintain strong working relationships with key faculty involved in developing educational programming from the 21 medical departments in the Schulich School of Medicine & Dentistry (SSMD)
 - Recruit and secure course faculty by communicating scope of the project and remuneration available.
 - Monitor course development process and communicate outcome of accreditation or endorsement to Manager, CME prior to advising 3rd party customer of approval.
 - Manage invoicing, billing and payment of honoraria via the NCNER process for all revenues and expenses associated with course development and implementation of live programs and endorsements as per financial policies and procedures.
- 4) Serve as Webmaster to maintain CME unit's website in accordance with SSMD guidelines. (15%)**
- Maintain general information, resources, contacts and external links sections of the CME website.
 - Regularly update online course calendar to reflect upcoming faculty-wide CME programs to ensure that not more than one event targeting the same audience is scheduled on the same date(s)/time(s) as per current policy and facilitate resolution between parties in case of scheduling conflicts.
 - Manage, develop and maintain on-line registration modules for each program managed by the CME office to enable medical professionals to register on-line.
 - Ensure that data integrity is maintained for any information that is collected via the internet.
 - Upload SSMD course information to the National University CME web portal being hosted by McGill University [www.university-cme.ca].

OTHER DUTIES (10%)

5) Other Duties - Provide Administrative support to Associate Dean, CME and Manager, CME

- Schedule meetings, manage travel arrangements, prepare conference registrations and travel expense reports.
- Prepare abstracts submissions for presentation of research posters/workshops at national and international conferences and scientific meetings.
- Prepare submissions required by the Office of Research Ethics for CME office research projects.
- Prepare and submit membership applications for professional organizations (Provincial, National and International).
- Organize participation, meeting agendas and minutes for CME committees, e.g. the Advisory Committee on CME and the CME Subcommittee.
- Define/recommend new policies to improve CME office function and program implementation (e.g. conference management contracts, endorsement templates, application approval templates etc.)
- Identify and recommend to Manager any specialized training or computer applications which would benefit CME Office
- Provide input into the development and preparation of SSMD's accreditation submission including the preparation of policies and procedures along with other relevant documentation at the time of accreditation renewal which usually occurs every 5-7 years; coordinate all meeting activities that are vital to the accreditation review process by setting agendas and communicating with accreditation team members.
- Develop agendas, contact presenters, and arrange catering and audio-visual equipment for bi-annual committee and sub-committee meetings.

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)	

No staff report to this position (upon occasion a summer volunteer student)

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

- Training and guidance for new employees – part-time support / i.e. Research Assistant
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 checked="" type="checkbox"/> Partial composition with general direction (verbal or written) <input type="checkbox"/> Prescribed format	e-mails, application approvals Letters to External faculty/associations Endorsement approvals,
Reports: <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Complete composition <input checked="" type="checkbox"/> Partial composition ... <input type="checkbox"/> Prescribed format	Report to RCPSC/CFPC on Programs approved for CME credits Advisory Committee Meeting Minutes
Other: <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Complete composition <input type="checkbox"/> Partial composition ... <input type="checkbox"/> Prescribed format	Agendas, UWO forms, P.O's, Cheque Requisitions, NCNERS, SANs, Travel Expense Reports. Grant applications and Ethics submissions

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

- Community college diploma in business administration or undergraduate degree in business related field and 5 years related experience in a large academic office.
- Demonstrated knowledge of UWO Policies and Procedures
- Demonstrated knowledge of Schulich School of Medicine & Dentistry Policies and Procedures
- Thorough knowledge of MS office suite including Word, Powerpoint, Excel and Access and Novell GroupWise 6.5
- Demonstrated proficiency with PeopleSoft Financials, PeopleSoft Human Resources
- Demonstrated proficiency with Dreamweaver 8 (Webpage design programming/editing software)
- Demonstrated ability to work independently as well as in a team environment
- Ability to prioritize multiple projects, tasks and deadlines in a very fast-paced interruptive environment
- Must be well organized, able to meet deadlines, be attentive to detail and demonstrate accuracy
- Ability to maintain strict confidentiality regarding staff and faculty information (personal visa and master card numbers, social insurance numbers and UWO ID numbers)

- Capable of handling stressful situations with a mature attitude
- Ability to deal with a wide variety of customers and personalities at varying levels of authority
- Posses excellent independent problem solving skills and telephone techniques
- Experience in a university environment
- Ability to work collaboratively with faculty, staff, students, and the public.

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

- The position requires that initiative be taken to set daily priorities and develop a course of action to accomplish duties.
- Priorities for major activities and objectives are developed with the CME Manager and Associate Dean.
- Regular weekly team meetings are used to review progress on objectives and to discuss ongoing and future projects in which the CME office is involved.
- Consultation is sought with the CME Manager and/or the CME Associate Dean when supervision, feedback or input is required or an unusual issue or problem arises.

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

- Confirmation and clarification of any unidentified expenses in PeopleSoft monthly operating budget reports
- Making inquiries as to the status of Travel Expense forms, Purchase Orders, or Invoice payments and ensuring that missing documentation relating to any payments are investigated and resolved with H/R or A/P
- Remuneration conflicts or inquiries from Faculty/Staff or outside consultants regarding payment status
- Handling and resolving issues regarding missing documentation pertaining to CME credit applications
- Handling requests for accreditation of programs that cannot be fulfilled due to non compliance with accreditation guidelines.
- Ensuring that project accounts are not run at a deficit by monitoring levels and requesting funding from departmental program chairs as required.
- Coordinating difficult travel arrangements or conflicting meeting schedules for Manager and Associate Dean, CME
- Providing information and guidance to internal faculty and non-Faculty persons or organizations external to UWO for program accreditation or endorsement.
- Determining the appropriate fee for the review and approval of CME credit applications from internal sources.

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

- Any requests which are not in line with CME and/or UWO policies and procedures
- Financial decisions beyond an agreed threshold of responsibility must be referred to CME Manager. (e.g. payment of invoices over the budget limit set for this position).
- Fee structure for the accreditation of co-sponsored program development and accreditation (with requests received from external sources).

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 prioritizing of responsibilities and outstanding deliverables.
- Weekly planning and prioritizing of outstanding projects (coordinating a timeline or deadline for information required from and to other staff members)
- Undertake a review of incoming and outstanding applications on a daily basis to determine priorities.
- Daily/weekly maintenance of the CME website
- Design and develop each of the required on-line registration modules for centrally managed CME programs
- Ensure receipt of all summary evaluations from each CME program that is accredited by CME office (external and internal) on a monthly database.
- Daily journaling of visa/mastercard fees from a central UWO account into the appropriate CME Fund 4 accounts

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...)
UWO Finance Department	outside	daily	Submission of received funds from sponsors and registrants, Setting up new Project Accounts (Fund 4 accounts), resolving issues relating to accounts (Fund 1 & 4), purchase orders, invoices and on-line travel claims
UWO Human Resources (NCNER's, Payroll)	outside	weekly	Provide information and receive clarification regarding payments to reviewer/lectures
CME Course Planners	outside SMD faculty Physicians	weekly	Provision of forms, guidance and feedback regarding accreditation applications and follow-up on receipt of required or outstanding document(s)
CME Committee Members (Local physicians, Department CE Directors, CME Course planners)	London area	2-4 times per year	Committee and subcommittee meeting management
Regulatory Authorities RCPSC, CPFC	Ottawa/Toronto	monthly	Submission of CME event accreditation approvals and rejections
Local, Provincial, National International, Medical Association and Organizations, Pharma Companies	outside	monthly	Requesting and providing information companies pertaining to CME grants and sponsorship requests
Western Office Supplies	outside	monthly	Order Office Supplies
Liaison with Revenue Canada	outside	monthly	Honoraria tax exemption process for out of country speakers at CME events

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

Staff Member: Kathy Dantzer

Present Classification Salary Grade 10 Signature Kathy Dantzer Date Nov 5/07

Supervisor: Jason Eadie

Signature [Signature] Date 5-Nov. 2007

POSITION DESCRIPTION QUESTIONNAIRE

The UNIVERSITY of WESTERN ONTARIO EMPLOYEE RELATIONS DEPARTMENT

A. PURPOSE

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 Human Resources at extension 82194.

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 the Human Resources 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 Jason Eadie

Department Head John Ruicci

Dean's Office _____

Date _____