

**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: JOAN GREENLEE
 Title: SECRETARY IV
 Phone: 85442
 Email: jkgreenl@uwo.ca
 Department: FINANCIAL SERVICES

(B) Position Information:

Current Incumbent: JOAN GREENLEE
 Current Classification: SECRETARY IV
 Classification Being Appealed: SECRETARY IV
 Date Evaluation Results Letter Received: JUNE 8, 2001

(C) Information Required For Job Evaluation Appeals Committee:

Reason for the appeal: My job classification should be changed because of the importance of the information I work with. Utilize the People Soft system (completely re-general ledgers reconciliations, journal entries, salary information input, budget data, looking for department codes on campus.

Supporting Information (Optional): a) salary data, upgrades and reconciliations for 3 separate areas, b) helping with budget inputs for new year's cost centres c) dealing with auditors at year end d) Professors, regarding Confidential Sabbatical, Removal Expenses. e) financial statements for the University's Year End
 (Attach an additional page if more space is required) for the University's Year End With these skills, and responsibilities, I should be

(D) Approvals: parallel to a salary grade 10.

Signature of Person Appealing: Joan Greenlee Date: June 14, 2001

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

<input checked="" type="checkbox"/> Employee	<input type="checkbox"/> Supervisor
<input type="checkbox"/> Dean (or designate)	<input type="checkbox"/> Budget Unit Head (or designate)
	<input type="checkbox"/> UWOSA

UWOSA JOB EVALUATION RECORDING FORM

Office Support Plan

(APPEAL)

Dept: Financial Services
Dept. Num. 421040
Incumbent: Joan Greenlee
Citte Mem.Present: UWOSA: M. Broadfoot, D. Hassall, J. Sparks
 ADMIN: C. Bumbacco, S. Demaray, C. Zrini

Job Title: Secretary 4

Eval. Date: 18-Jul-01

	FACTOR	COMMENTS	SUB FACT	DEGREE	PTS	Profile		
						-	=	+
I	Job Knowledge	No educational standard stated in PDQ. Full vocational assumed. Previous experience 6 months plus on the job experience	Educ	2				
			Exper.		D	55		X
II	Initiative	Receives little supervision, works from general policies. Independent						
				4	55	X		
III	Complexity/Judgement	Varied work but working toward well defined objectives. Established standards, techniques						
				4	35		X	
IV	Contacts	Regular contact with many people to provide policy and procedure information						
				3	45		X	
V	Errors	Errors would be discovered outside department. Complaints likely to be reported to supervisor						
				3	45		X	
VI	Supervision of Others	Incidental	Char.	1				
			Scope		Any	5		X
VII	Effort/Demands	"Keeps many tasks in the air" Concentration and attention required						
				2	30		X	
VIII	Physical Environment	Office - agreeable environment						
				1	10		X	

CLASSIFICATION ASSIGNED

Total Pts: 280

Group: Secretary

Level: 4

EVAL. DATE: 18-Jul-01

Co-Chair Signatures: UWOSA: Jackie Sparks

ADMIN: Chris Bumbacco

**POSITION DESCRIPTION
QUESTIONNAIRE**

**THE UNIVERSITY OF WESTERN ONTARIO
EMPLOYEE RELATIONS**

16.1

U.W.O. ID NUMBER _____

PRESENT INCUMBENT
SURNAME _____ INITIALS _____

POSITION IDENTIFICATION
DEPT. NO _____ P.S. JOB CODE _____

GREENLEE _____ JK _____

421040 _____ 224

BASIC POSITION INFORMATION

DEPT. NAME Financial Services _____

SECTION NAME General Accounting _____

LOCATION S-Lawson Bldg. Room 280

WORK WEEK HRS. 35 _____

SUPERVISOR SURNAME Scott _____ INITIAL C _____ PHONE 85448 _____

FOR SALARY ADMINISTRATION USE			
CLASS'N	Secretary		
CLASS'D	June 1st	EFFECT	A.C.
	Date		Date
ANALYST	D. Chute Nolan		

- 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	%
-	See attached pages	
-	Typing for Controller, General Accounting and Research Services as required,	
-	Receptionist for office area, directing and answering questions, handling mail, cheques and drafts for area,	
-	Answering telephone with 2 internal and 2 external lines,	
-	Handling cheques for pick up and mailing out, Accounts Payable, Travel and Library,	
-	Processing Foreign drafts, creating and distributing, mailing out,	
-	Vendoring all Travel Expenses, Advances and Cheque Requisitions into the PeopleSoft System,	
-	Updating weekly Foreign rates on PeopleSoft and Netscape Programs for use throughout the university,	
-	Reconciling cost centres for 2 areas in Financial Services, including full and part time salary, helping with budget documents	
-	Arranging meetings, trips, scheduling agendas, rooms and equipment etc.	
-	Delivering documents to and from different areas of the university, (with and without courier)	

NO.	OTHER DUTIES (less than 10%)
-	Ordering and receiving supplies for the department
-	Arranging of repairs for all equipment, ie fax, photocopiers, printers etc.
-	Helping to ensure office runs smoothly

Duties - Administrative Assistant to the Controller, Financial Services.

Typing letters and preparing worksheets for the Controller, Research and Supervisor of General Accounting as required. During year end assistant Ernst and Young with their correspondence (ie. letters of representation, confirmation letters and audit report(s). Back up to Associate VP of Financial Services administrative secretary when absent (as again as needed).

Sabbatical Removals - after receiving a list of Faculty members who will be on sabbatical leave from Research Services, checking request forms, accounts and amounts with the controller, then sending a list of names, dates, etc. to payroll for pay deductions, and to FABA for salary adjustments. Creating files and information packages to be sent out to each Faculty member. Dealing with professors who are on leave, (ie. questions on filling out forms, moving expense questions, receiving their advances), reviewing documents during leave and reconciling (organizing) their expenses on return. Corresponding to the Faculty's bank with their advance cheques. Keeping up to date files on each sabbatical with all relevant documentation, between the Controller's office, payroll and sabbaticant. Meetings with sabbaticants on return to reply to enquiries and make adjustments to their removal reports. Using E-mail to correspond with the Faculty member while away.

Travel - handles all vendoring of cheque requisitions, advances, expense reports, as needed into the PeopleSoft system. Keying cheque requisitions and petty cash forms into the PeopleSoft system daily, after checking accounts, amounts and tax codes, to create cheques for the various areas on and off the campus. Creating a list for use with the next day cheques. Matching enclosure, instructions with the cheques before mailing them.

Foreign currency tables - weekly foreign currencies are updated into our PeopleSoft and E-mail (julian) system for across campus viewing. Down loading the weekly rates from the Bank files, mailing and delivering copies locally.

Handles inquiries for Financial Services and other areas of the University. Directs callers to the right department. Answers questions re: Travel, Accounts Payable and Sabbatical requests or directs caller to right location for assistance, ie Fees for student information re tuition.

Processes weekly pay requisitions for Travel, Accounts Payable and Research Services part-time people as well as looking after Bursary students. Setting up E-mail job applications for 5 Bursary students in the department. Checking hours, rates and account number for such.

Cheques - receives all Travel, Accounts Payable, and Library cheques for sorting before mailing out. (Balance to be mailed out after pick-ups by departments or individual person) Comparing daily cheque list for requests.

Handles monthly contractor cheques for distribution and mailing.

Reconciles monthly cost centres for 2 areas in Financial Services, plus full and part-time salaries.

Foreign draft notices are down loaded from the PeopleSoft system weekly, matched with the current enclosure, given to the Controller for signature before being mailed out (all over the world, after keying envelopes for each).

Setting up meetings for the Controller, supervisor of General Accounting and managers as required as well as making sure rooms and equipment are available as needed.

Handles items being sent by courier in or out of the office.

Ordering all supplies, re Financial Services department, stocking all Travel forms ie expenses, advances, cheque requisitions, as needed for area. Ordering all envelopes for Office services for cheques., Ordering all printing material for year end statements. Handling enquires re broken equipment, re fax, photocopier etc. Calling company re service calls on all equipment.

Telephone system - is telephone co-ordinator for Financial Services, mainting up to date information on department people's position, phone numbers and email addresses. Correcting and updating as needed through the new Western Telephone Directory System.

Looking after monthly binding of Trial balances. Binding year end financial statements as needed.

Monthly data distribution re our Financial Date Blue Book (monthly statements) photocopying and distribution to campus areas (ie president's office, etc.) Dealing with managers re-scheduling copies and reports for printing.

Helps in Accounts Payable and Travel when backlogged at year end with keying of invoices and tallies (uploads) etc. Keying all monthly, G.F.T. secretarial salaries for Travel area. Handling paper details for stop payments, replacement cheque inquiries, lost cheques before giving them to the Supervisor for printing of new cheques.

Creating new forms on Microsoft word or excell, as requested - ie. Professional Development Forms, full and part-time, as well as S.A.G.E. etc. Photocopying and updating files as changes are made.

Helping auditors and internal staff as needed with financial statements, printing, phitocopying, etc. at year end.

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
Corres- pondence: <input checked="" type="checkbox"/>	XX___ Complete Composition XX___ Partial composition with general direction (verbal or written) XX___ Prescribed format	- Sabbaticals re: funds deposited - problems with their reporting
Reports: <input checked="" type="checkbox"/>	___ Complete composition XX___ Partial composition ... ___ Prescribed format	- Activity Fees for Affiliates - Cost centre summary report
Other: <input checked="" type="checkbox"/>	___ Complete composition XX___ Partial composition ... XX___ Prescribed format	

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

- Ability to use a microcomputer with Microsoft programs, Word and Excell, Lotus and WordPerfect,
- Banking computer for draft uploads and printing of foreign draft importing
- Operation of fax, photocopiers, (variety of models) multi-line telephone and adding machines an asset
- Ability to work with a minimal amount of supervision
- Ability to meet deadlines and to communicate effectively both written and oral with faculty and staff

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

- As required for Sabbatical Tax questions

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

- Keying of Travel Expenses, and Cheque Requisitions
- Helping out with Accounts Payable and Travel backlog (work sharing as required at year end)
- Reconciling accounts for our department, General Accounting and Research Accounting
- Keeping weekly payroll records, helping with budget accounts, (full and part time staff)
- Looking after bursary students, applications, forms, recording time and salary

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

- Tax problems re Sabbaticals

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

- Vendoring all Travel Expenses, Cheque Requisitions, and Advances into the PeopleSoft System
- Typing for all Cheque Requisitions for Travel, including all Petty Cash Forms

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 COMMUNICATION (e.g. Purchasing Agents)	LOCATION		FREQUENCY			PURPOSE OF THE COMMUNICATION (e.g. to provide information concerning...)
	(inside dept)	(outside dept)	(dly)	(wkly)	(mthly)	
Professors		XX			XX	Sabbatical
Administration personal	XX	XX	XX	XX	XX	Queries re: lost cheques, replacement cheques, etc. for departments and suppliers
Finance Department staff	XX		XX	XX	XX	Helping with year end statements

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

Staff Member:

Present Classification SSIV Signature Joan Greenlee Date Feb. 16/01

Supervisor:

Signature [Signature] Date Feb 16/01

Seen

POSITION DESCRIPTION QUESTIONNAIRE

THE UNIVERSITY OF WESTERN ONTARIO EMPLOYEE RELATIONS DEPARTMENT

MAR 5 2001

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 Salary Administration at extension 82198.

C. INSTRUCTIONS

- 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.
- 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%)
- 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

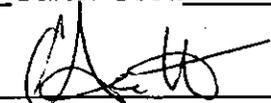
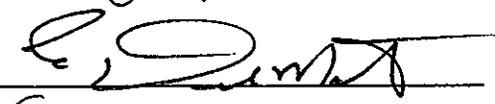
- A change in duties and/or responsibilities does not automatically imply a change in classification and salary.
- A job description is not intended to measure an increase in the volume of work; rather it should only reflect the areas of responsibilities and the nature of duties.

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 Carter Scott
- Department Head 
- Dean's Office 
- Date Feb 16/2001