

# Job Family Promotion - Verification Instructions

## *(HR Liaisons and Supervisors)*

The availability of an additional designated level within the job family title series does not, on its own, indicate that an employee should be promoted. Rather, it signifies that there is the **potential** for a promotion.

### I. Verifying Eligibility

As warranted, the HR Liaison and supervisor should work together to verify eligibility.

- The HR Liaison has access to the Job Family Promotion Tracking Smartsheet®. This resource identifies employees within your division or area of responsibility whose job is within a title series, but not at the top level of the title series.
- This does not mean that all identified employees are eligible. Employees being considered for promotion **must meet each** of the following three criteria:
  - **Eligibility Threshold #1** - The employee must have been at their current level within the job title series for the required length of time.
  - **Eligibility Threshold #2** – The employee must complete any training and development requirements for the next higher level within the title series.
  - **Validation of Warranted Promotion** - The employee must be performing the duties, responsibilities, and accountabilities specified at the higher level in their job description at a level of “meets expectations” or above.

#### Eligibility Threshold #1 - Length of Time in the Current Level

1. Locate the Job Family Levels section of the employee’s [Job Description](#). Identify the required minimum time requirement as specified under the “Education and Experience” column. (*Example: “Experience must include at least 2 years at the preceding level or equivalent.”*)
2. The HR Liaison should log into Banner 9 and follow these steps:
  - In the search box, type NBIJLST (N B I J L S T) for an “Employee Job Inquiry”. Click Enter and the window titled “Employee Job Inquiry...” will become visible.
  - In the “ID:” search box, type in the employee’s AU Banner ID number.
  - In the “Query Date” search box on the top right, change the date of the year from 2021 to 2005.
  - Note in the lower half of the window, from left to right are column headers labeled: “Effective Date,” “Job Status,” and “Description”. Confirm the current “Description” that is the employee’s current job title in the job family.
  - Identify the “Effective Date” that the employee was first placed into that “Description” assignment.
  - From this “Effective Date”, validate that sufficient time has been achieved to be eligible for promotional consideration. If sufficient time in the current level has not been reached, then consider whether sufficient time “Equivalency” has been achieved through prior work experience (as specified on the job description).
  - Should the employee’s actual time or equivalent time be reached, the employee **may be eligible** based on the specified developmental and/or training requirements having also been achieved.

## Eligibility Threshold #2 – Completion of Training and Development Requirements

1. The supervisor may establish specific training and development plans as part of the performance planning process.
2. The supervisor and/or HR Liaison will work together to determine if training/development requirements have been met. The following should be used in making this determination:
  - The employee’s job description
  - The employee’s development plan (part of the annual performance planning process)
  - The employee’s personnel file

**IMPORTANT:** *If the employee has not met the established development expectations, then they are not eligible to be considered for promotion.*

## Validation of Warranted Promotion

If **both eligibility thresholds** have or will be met **by Oct. 1, 2024**, then validate that the employee is currently demonstrating the required higher levels of work, at a “*meets expectations*” performance rating or above. If this can be validated, then **the employee is eligible for promotional consideration.**

## II. Promotional Consideration

1. Complete the Request for Job Family Promotion packet. (*Note: The packet includes the request and justification forms along with sample job family levels.*)
  - On the justification form, the supervisor should **provide at least two specific supporting examples** for each question.
  - The following should be validated on the form:
    - Specific levels of training and competencies in the performance of responsibilities
    - Knowledge, education, and experience, as specified in the *Job Family Levels* section of the job description
2. Secure the following approvals:
  - Supervisor
  - Department Head
  - Dean/Director
  - HR Liaison
3. Supervisors should submit the completed, validated, and signed packet, along with any supporting documentation, to the HR Liaison. The HR Liaison will then submit the packet to University Human Resources.