AGENCY TRANSITION GUIDELINES

The first step in approaching the transition to the new IT classifications is to set up an IT Classification Agency Transition Committee to work through the transition process. The suggested size of the committee depends on the number of members in the agency's IT department. Pursuant to the contract, the maximum size is eight (four management representatives and four union representatives) and the suggested minimum size is four (two management representatives and two union representatives).It is suggested that the CIO for the agency be the management co-chair with selected members from his/her staff as well as the human resources office. OCSEA will appoint the union members to the committee.

The first meeting the IT Classification Agency Transition Committee holds should include members from the Statewide IT Transition Oversight Committee to provide guidance, suggestions and/or answer questions about transition. The first order of business on the agenda needs to be for the Statewide committee to familiarize the Agency committee with the new contract language associated with the new IT classifications (i.e., 36.05 B {transition}, 8.05 {statewide committee responsibilities} and 18.08 {layoff language})[1] and the position description process.

The second order of business for the committee should be identifying the transition period and completing the timeline template below.

AGENCY TRANSITION PERIOD **Starting:** **Ending:**	
Date	
	IT Classification Agency Transition Committee Formed
	Letter to all IT Employees
	Training on the DIT
	Duty Identification Tool (DIT) sent to Employees for completion
	DIT returned to Supervisor for review; Supervisor to complete their section
	DIT returned to Employee for rebuttal
	DIT packet reviewed by management designee; complete their section
	DIT packet returned to and reviewed by CIO and Agency Committee
	Classification Placement
	Employee notified of new classification and position description

The following documents are available to help with the transition: 1) a template of a letter to all agency employees identified/assigned to perform duties outlined by the new IT classifications, 2) the Duty Identification Tool (DIT), 3) an updated position description template and 4) a template of a letter to the employee providing the allocation determination and effective start date in the new classification. Please feel free to modify these templates to fit your needs. However, you cannot modify the Duty Identification Tool.

[1] **www.das.ohio.gov/ hrd/itclass.html** or **www.ocsea.org/infotech**

The purpose of the Duty Identification Tool (DIT) is to assist in placing the employee into the proper classification by identifying all of the duties currently assigned and performed by the employee. The DIT is a modified version of the position description questionnaire (PDQ).

The transition process utilizing the DIT should follow this pattern:

1. **DIT TRAINING** – All affected employees should be trained on how to complete the Duty Identification Tool. Training should be held prior to the date the Duty Identification Tool is to be turned into the supervisor. To schedule the training, contact Sandi Friel at (614) 865-4713 or e-mail at sfriel@ocsea.org or Ashley Hughes at (614) 466-3619 or e-mail at Ashley.Hughes@das.state.oh.us. The training should take about one hour. All affected employees should be in attendance.

2. **DIT EMPLOYEE SECTION TO COMPLETE** – After the training, employees will be asked to complete the Duty Identification Tool – Employee Section. They may do so on work time subject to operational needs. If an employee fails to complete the Duty Identification Tool, the supervisor must complete the document.

3. **DIT SUPERVISOR SECTION** – Once the employee has completed the Duty Identification Tool – Employee Section, it should be turned into the supervisor for review and for the supervisor to complete the Supervisor Section of the DIT.

4. **DIT EMPLOYEE REBUTTAL SECTION** – After the supervisor completes a review of the employee's responses and the Supervisor Section of the DIT, the DIT packet will be returned to the employee. The employee then may add comments using the DIT – Employee Rebuttal Section, if desired. Next the employee forwards the DIT packet to the management designee.

5. **DIT MANAGEMENT DESIGNEE SECTION** – The management designee will also review the DIT packet and provide comments in the Management Designee Section of the DIT. This step completes the DIT packet for allocation determination.

   PLEASE NOTE – Neither the employee, the supervisor, nor may the management designee change the Duty Identification Tool responses of any other party.

6. **IT CLASSIFICATION AGENCY TRANSITION COMMITTEE** – The IT Classification Agency Transition Committee will oversee the DITs moving along internally and will hold discussions where there is a question about the appropriate classification to be assigned (e.g., they might facilitate conversation between the employee and the supervisor to fully understand the employees assigned duties). However, it is a management right to make the final classification assignment determination. *See #12 if disagreement continues*.

7. **POSITION DESCRIPTIONS** – Once the classifications have been assigned, the agency human resources office shall use the updated position description template form to develop updated position descriptions. At this time, the primary, and any secondary, technologies are assigned to each position.

8. **EMPLOYEE NOTIFICATION** – Using the notification letter template, a letter should be sent to each employee indicating his/her new classification, pay range and step as well as the effective date for allocation to the new IT classification. The position description shall accompany this letter.

9. **SUPERVISOR NOTIFICATION** – Each supervisor should be notified of the classification, pay range and step of each employee who reports to him/her. This can be done by copying the supervisor on each employee notification letter. Each supervisor also should be notified of any employee who needs a transition plan. For more information, please see Article 36.05 (B) (4) (D). This transition plan is a joint endeavor between the employer and the employee. The duration of a transition plan is for up to two years. However, transition plans may be extended for an additional year if circumstances exist that precluded the employee from gaining the required skill or experience.

10. **AGENCY HUMAN RESOURCES NOTIFICATION** – Your agency human resources office needs to be fully engaged in allocation in order to effect movement to the new series, any pay range changes (with same pay rate) and especially when an employee needs placed into a lower classification pay range. The employees placed into a lower classification pay range will be given preference, by seniority, for the following (See the contract Article 36.05 B. 4. C.):
    - ✓ Any training offered to obtain the skills required to do the work in their former, and in some circumstances higher, pay range.
    - ✓ Any promotional opportunities available in their former, and in some circumstances higher, pay range.

11. **DAS HUMAN RESOURCES PERSONNEL ACTION (PA) PROCESSING** – Please be advised that DAS State Services needs advance notice for submission of larger than usual quantities of PAs. Please notify Angie Turner at 614-466-0732 or via email at angie.turner@das.state.oh.us.

12. **ALTERNATIVE DISPUTE RESOLUTION** – Any grievance related to allocation needs to be filed within 30 days of the notice of placement and shall follow Article 25 through Step 3. If not settled through Step 3, they shall be submitted to the Alternative Dispute Resolution Committee of the Statewide IT Transition Oversight Committee.

Many of your employees may have duties that fall into more than one classification type. In the ever changing world of IT this is to be expected and the classifications were written with some overlap included. Please use this to your agency's and the employee's benefit. The Joint IT Classification Committee agreed to a "cost neutral" transition to avoid budgetary concerns becoming the overriding factor in placing employees into the new classifications. For this to work efficiently and effectively, employees need to be transitioned according to their duties.

If anyone involved in this process has questions that you can't answer, please contact the Statewide IT Committee Sandi Friel at (614) 865-4713 or e-mail at sfriel@ocsea.org or Ashley Hughes at (614) 466-3619 or e-mail at Ashley.Hughes@das.state.oh.us.