

University of Wisconsin – Madison

Pay Adjustment Tools & Mechanisms Justification Matrix

Last Updated 4.21.2020

All pay adjustments noted in this matrix must be awarded in accordance with the Office of Human Resources Pay Adjustments Policy ([OHR Policy 10.01](#)). The Office of Human Resources (OHR) must approve all base adjustments for UW-Madison employees outside of the pay plan. **Until final approval is obtained by OHR, no university official is authorized to promise a base adjustment to an employee.**

In specific situations submitting an Overload may be more appropriate than a pay adjustment. Information on overloads may be found in HR Policy 11.02: <https://kb.wisc.edu/ohr/policies/page.php?id=53140>

ELIGIBILITY: To verify which employee classes are eligible and the types of adjustment that can be awarded (base-building, lump sum), see Pay Adjustments Tools and Mechanisms Eligibility Matrix: <https://www.ohr.wisc.edu/docs/PayAdjustmentToolsMechanismsEligibilityMatrix.pdf>

AMOUNT: To determine amounts that can be awarded, see Pay Adjustments Tools and Mechanisms Amount Matrix: <http://ohr.wisc.edu/docs/PayAdjustmentToolsMechanismsAmountMatrix.pdf>

Type of Pay Adjustment	When Request is Needed	Evidence for Need	Supporting Documentation	HR System Used
Equity (HRS Code 006) Sample Justification Wording	To correct for inequity compared to staff of similar training, experience and responsibilities –OR - when inequities are created by hiring new employees at rates higher than existing staff – OR – to address significant pay compression.	<ul style="list-style-type: none"> Evidence of necessity to hire new employees at higher levels; and/or Evidence of pay compression between an employee and his/her immediate subordinates or peers with fewer years of service 	<ul style="list-style-type: none"> Analysis of the effect of adjustments on the salary structure within the department (and division) including the effect on gender/race pay equity (must identify those receiving an increase and those who are not; explain why) Identification of newly hired employees & salaries (if applicable) Identification of the “similarly situated group of employees” (if applicable) Methodology/formula used to determine the adjustments For Faculty, see: https://provost.wisc.edu/academic-policies- 	All eligible Empl Classes: Rate/Title System

Type of Pay Adjustment	When Request is Needed	Evidence for Need	Supporting Documentation	HR System Used
			and-guidelines/standard-salary-equity-review-policy/ <ul style="list-style-type: none"> Statement regarding the performance level of the individual (i.e. satisfactory performance) 	
Market Factor Adjustment				
Outside Offer (HRS Code 022) Sample Justification Wording	To retain an employee who has received an offer of employment from outside UW System . The position offered must be a position with comparable duties and responsibilities, and at a rate higher than his/her existing rate	<ul style="list-style-type: none"> Evidence of an offer of employment from a university or organization outside of UW System 	<ul style="list-style-type: none"> A copy of the outside offer letter or other evidence of the offer (for example, email exchanges between the employee and the outside institution that reference salary) Evidence that the position offered is comparable to current position (e.g. a job posting or job description) Statement of the effect of adjustment on the salary structure within the department (and division) including and excluding the effect on gender/race pay equity 	All eligible Empl Classes: Rate/Title System
Retention (HRS Code 081) Sample Justification Wording	To retain one or more employees when there is a serious retention problem due to increased interest to take outside positions with comparable duties and responsibilities at higher levels of pay	<ul style="list-style-type: none"> Evidence of a retention problem such as a recent pattern of employees in the same discipline/unit leaving UW to take outside positions. 	<ul style="list-style-type: none"> Summary of the retention issue Statement regarding the performance level of the individual (i.e. exemplary performance) Statement of the effect of adjustments on the salary structure within the department (and division) including and excluding the effect on gender/race pay equity 	All eligible Empl Classes: Rate/Title System
Competitive (HRS Code 080) Sample Justification Wording	To retain one or more employees when there is no outside offer or specific example of current retention problems, but there is evidence of a potential retention problem	<ul style="list-style-type: none"> Identification of potential retention problems based on peer market data 	<ul style="list-style-type: none"> Data showing that the current salaries are below the external labor market Statement regarding the performance level of the individual (i.e. satisfactory performance) Identification of individual(s) and the methodology/policy for the adjustments 	All eligible Empl Classes: Rate/Title System

Type of Pay Adjustment	When Request is Needed	Evidence for Need	Supporting Documentation	HR System Used
			<ul style="list-style-type: none"> Statement regarding the effect of adjustments on the salary structure within the departments including and excluding the effect on gender/race pay equity 	
<p>Permanent Change-in-Duties/Permanent Reclassification (may or may not include Title change) (HRS Code 001)</p> <p>Sample Justification Wording</p>	<p>May be requested when a substantive change in the duties and responsibilities of a position occurs</p> <p>All permanent change-in-duties requests should include a review to determine if a new title is appropriate based upon the change.</p>	<ul style="list-style-type: none"> List of current duties (including percent breakdown) with a comparison list of proposed duties (including percentage breakdown); change in duties of 50% or more may indicate a new position, for which recruitment may be required. Explanation of how the change-in-duties came to be; and Evidence of a substantial change in duties (qualitative rather than just quantitative); and This is typically considered a year or more after taking a new position, unless there are extenuating circumstances 	<ul style="list-style-type: none"> Updated version of job duties with percentages assigned. Updated organization chart (if applicable) 	<ul style="list-style-type: none"> Academic Staff and Limited: Rate/Title System University Staff: CHRIS-HR
<p>Title and/or Range Change due to Promotion/Pay Progression (HRS Code 003)</p>	<p>Employee achieves expected progress in the area of specialty with greater experience, expertise, and responsibility in the particular position.</p>	<ul style="list-style-type: none"> List of current duties (including percent breakdown) with a comparison list of proposed duties (including percentage breakdown); change in duties of 50% or more may 	<ul style="list-style-type: none"> Updated version of job duties with percentages assigned Resume showing outside work if promotion request is based on work experience outside UW Updated organization chart (if applicable) 	<ul style="list-style-type: none"> Academic Staff and Limited: Rate/Title System and must include

Type of Pay Adjustment	When Request is Needed	Evidence for Need	Supporting Documentation	HR System Used
Sample Justification Wording	When a University Staff employee in Schedule 14 or 15 is due a progression adjustment in accordance with OHR Policy 10.01, V. e.	indicate a new position for which recruitment may be required; and <ul style="list-style-type: none"> • Explanation of advancement in knowledge, skills, ability; and • This is typically considered a year or more after taking a new position, unless there are extenuating circumstances 	<ul style="list-style-type: none"> • <i>Note:</i> Progression adjustments in accordance with OHR Policy 10.01, V. e. do not require the supporting documentation above 	title change for promotion <ul style="list-style-type: none"> • *Progression adjustments in accordance with OHR Policy 10.01, V. e. require an email to the Compensation and Titling Specialist indicating an adjustment is necessary.
Temporary Change-in-Duties (HRS Code 025) Sample Justification Wording	The rate increase for an employee who assumes temporary responsibilities such as a temporary assignment while the unit is recruiting for a permanent position; an assignment of an unusual, short-term or non-recurring nature; or a temporary administrative or work assignment	<ul style="list-style-type: none"> • List of current duties (including percent breakdown) with a comparison list of proposed duties (including percentage breakdown); and • Explanation of how the change-in-duties came to be, and expected duration of the duties; and • Evidence of truly new duties – not just more of the same duties; and • If interim duties, must have evidence that the new duties are only a portion of another position (taking over another position in its entirety requires a Waiver) 	<ul style="list-style-type: none"> • Updated version of job duties with percentages assigned including duties of the temporary assignment • Appointment letter for acting/Interim role (if applicable) • Updated organization chart (if applicable) 	<ul style="list-style-type: none"> • Academic Staff and Limited: Rate/Title System • University Staff: CHRIS-HR

Type of Pay Adjustment	When Request is Needed	Evidence for Need	Supporting Documentation	HR System Used
Special Initiatives	Occasionally, UW-Madison will identify situations in which a special campus compensation program is necessary (ex. High-demand Fund, Critical Compensation Fund)	To be determined by UW-Madison leadership	To be determined by UW-Madison leadership	All eligible Empl Classes:Rate/Title System or as instructed by OHR at the time of implementation
<p>Performance (Outside of Pay Plan) (HRS Code 091)</p> <p>Sample Justification Wording</p>	May be awarded for achievements, based on a structured and consistent process that links employee compensation to employee performance	<ul style="list-style-type: none"> • Length or frequency of the outstanding performance; and/or • Overall significance of the employee's work products; and/or • Regularity with which the outstanding performance or unique contribution is demonstrated; and/or • Whether employee has acquired additional competencies which are both specialized and critical in carrying out the permanent functions of the position 	<p>Per OHR Policy 8.01, Managers and Supervisors must have completed all required performance management activities for those employees whom they supervise in order to receive a performance adjustment.</p> <p>Satisfactory performance evaluation on or after the previous fiscal year start. No documented performance concerns.</p>	All eligible Empl Classes: Rate/Title System

Type of Pay Adjustment	When Request is Needed	Evidence for Need	Supporting Documentation	HR System Used
LUMP SUM				
LUMP SUM PAYMENT - Performance (handled in Additional Pay in HRS) Sample Justification Wording Lump Sum Codes HPE US UPE FAASLI	Employee performs a task or completes a large project and the employer would like to reward the work with a one-time payment.	<ul style="list-style-type: none"> Division leadership may determine when to provide lump sum adjustments. 	<ul style="list-style-type: none"> Copy of the latest performance review Information on the completion of a large project or department event Statement on the employee's performance 	All eligible Empl Classes: HRS Exempt and Non-Exempt Staff eligible
LUMP SUM PAYMENT - Supplemental (handled in Additional Pay in HRS)	Occasionally a unit may identify a situation when an exempt employee is asked to assume unplanned or additional activities which are mission critical or needed to maintain coverage. The identified categories are emergencies, maintenance or events, and maintaining coverage. These lump sums recognize one-time or	<ul style="list-style-type: none"> Need for an immediate response by an employee outside normal shift, and the work needing to be performed is mission critical No ability to adjust schedule in order to staff an event Need to maintain a minimum/required staffing level Need due to position vacancy or extended leave of absence 	<ul style="list-style-type: none"> Summary of the situation and explanation of why lump sum is being requested <ul style="list-style-type: none"> Emergency <ul style="list-style-type: none"> Unplanned, unscheduled activity Called in/held over outside of normal shift/hours Need for immediate response And either: <ul style="list-style-type: none"> Mission-critical work as defined by unit; OR Life and/or Safety issue(s) Maintenance or Events <ul style="list-style-type: none"> Management-scheduled activity (not self-scheduled) Need for additional staffing 	All eligible Empl Classes: HRS Exempt Staff Only * Non-Exempt Staff receive overtime or compensatory time per Fair Labor Standards Act (FLSA) and UW-Madison

Type of Pay Adjustment	When Request is Needed	Evidence for Need	Supporting Documentation	HR System Used
<p>Lump Sum Codes</p> <p>Emergency HEM US UEM FAASLI</p> <p>Maintenance or Events HMA US UMA FAASLI</p> <p>Maintain Coverage HCV US UCV FAASLI</p>	<p>limited duration effort. These lump sum payments are overloads and typically cannot exceed \$18,000 or 20% of annual salary (whichever is greater) during a fiscal year.</p> <p>Emergnc Adj No IC/IC 19 Emergnc Adj No IC/IC 18</p> <p>Maint Adj No IC/IC 19 Maint Adj No IC/IC18</p> <p>Coverg Adj No IC/IC 19 Coverg Adj No IC/IC 18</p>		<ul style="list-style-type: none"> • No ability to adjust schedules in order to staff event • Operational Necessity • Maintain Coverage <ul style="list-style-type: none"> • Need to maintain a minimum/required staffing level; OR • Need due to vacancy or extended leave of absence • Information on the duration of time spent on the activity • Summary of why the work is mission critical and required work to be done immediately (if applicable) 	<p>Overtime Policy</p> <p>These lump sum payments are overloads and typically cannot exceed \$18,000 or 20% of annual salary (whichever is greater) during a fiscal year.</p> <p>*Non-Exempt Staff may receive these payments if part of the Retention & Risk Bonus program</p>

Sample Justification wording

Equity (HRS Code 006)

Example #1: between similar staff

The Department of DEPARTMENT is requesting a base pay increase for EMPLOYEE based on internal equity between similar staff. EMPLOYEE has satisfactory performance. EMPLOYEE is an Information Processing Consultant with a current annual salary of \$72,000, as compared with these other employees (see attached salary spreadsheet): COMPARISON EMPLOYEE #1 \$75,000; COMPARISON EMPLOYEE #2 \$76,000.

We request a pay increase for EMPLOYEE to \$75,000, to bring him/her in line with these other similarly situated employees. We have reviewed the impact of this adjustment on the internal equity of the Department and believe the adjustment is needed to maintain internal equity.

Example #2: hiring new employees at higher rates

The Department of DEPARTMENT is requesting a base pay increase for EMPLOYEE based on internal equity created by hiring new employees at higher rates. EMPLOYEE was hired as a Payroll and Benefits Specialist Advanced on July 18, 2016 and is being compensated lower than recent new hires in the same title performing similar work who have less experience. EMPLOYEE has satisfactory performance. His/her current rate is \$25.60/hour, as compared with these other new hires (see attached salary spreadsheet):

- COMPARISON EMPLOYEE #1 hired in January 2017 at \$26.60/hour
- COMPARISON EMPLOYEE #2 hired in June 2017 at \$27.00/hour
- COMPARISON EMPLOYEE #3 hired in May 2017 at \$24.00/hour and is less experienced than all peers in the Department

Finalists during the last recruitment indicated they had received job offers for similar positions at \$27.00-29.00/hour. We request a pay increase for EMPLOYEE to an annual salary of \$28.00/hour to bring him above the rate of these comparison employees, since he/she has 4 years more experience than his peers. We have reviewed the impact of this adjustment on the internal equity of the Department and believe the adjustment is needed to maintain internal equity.

Example #3: Compression

The Department of DEPARTMENT is requesting a base pay increase for EMPLOYEE based on internal equity compression between employee/supervisor. EMPLOYEE has satisfactory performance. EMPLOYEE is an Outreach Program Manager II with a current annual salary of \$80,000, supervising COMPARISON EMPLOYEE #1, who was recently promoted to Outreach Program Specialist Senior at \$78,000 (see attached salary spreadsheet).

We request a pay increase for EMPLOYEE to \$85,000, to increase the pay differential between EMPLOYEE and COMPARISON EMPLOYEE #1 and bring EMPLOYEE'S pay in line with others in the same title in the division. We have reviewed the impact of this adjustment on the internal equity of the Department and believe the adjustment is needed to maintain internal equity.

Example #4: Faculty Salary Equity Review

An additional type of equity review specifically for Faculty; Guidelines set by Office of the Provost – see “Guidelines for Implementation – Standard Faculty Salary Equity Review” (<https://provost.wisc.edu/academic-policies-and-guidelines/standard-salary-equity-review-policy/>).

Equity Adjustment for MARTHA WASHINGTON

We request a base pay increase of \$XX for Dr. MARTHA WASHINGTON. Upon completing the annual faculty salary equity study, the Department of Money identified Dr. MARTHA WASHINGTON as a candidate for an equity increase. Dr. WASHINGTON’S current UW base rate of \$XX,XXX is low compared to peers within the department. Dr. WASHINGTON is a PhD Associate Professor and the mean for all Associate Professor PhD faculty is \$XX,XXX (\$XX,XXX if Dr. WASHINGTON is excluded).

Dr. WASHINGTON, PhD is a basic science researcher appointed as an Assistant Professor in March of 2010 with an Institutional Base Salary of \$XX,XXX. She was promoted to Associate Professor in July of 2015. Dr. WASHINGTON is one of five PhD associate professors within the Department of Money and has the lowest base salary of that group. When comparing Dr. WASHINGTON with all PhD faculty in the department, we noted that there are four Assistant Professors that are within \$5,000 or less of Dr. WASHINGTON’S salary.

[EXPLAIN WHY/HOW COMPARABLES WERE CHOSEN, AND PROVIDE SALARY EQUITY SPREADSHEET]: Dr. WASHINGTON has the same research and teaching services responsibilities as that of her peers with her research time devoted to the general field of Coins with specific expertise in the Penny. Dr. WASHINGTON has 15 awards and 65 publications. As shown below and noted on the spreadsheet provided (“Salary Equity Review-Faculty Comparison”), duties, awards and publications relative to comparable faculty confirm that an adjustment to maintain equity of Dr. WASHINGTON’S salary is appropriate.

Comparable Department of Money faculty members are:

1. George Washington, PhD (Associate Professor, Division of the One Dollar, \$XX,XXX)

Basic science researcher recruited in January 2010 as an Assistant Professor and promoted to Associate Professor in July 2016.

Basic Duties: This position involves research and teaching services as expected of a tenure track faculty member. Research time devoted to the field of one dollar bills and quarters. An equitable role in the teaching activities of the Division of the One Dollar along with fellow conference.

Number of Awards: 10; Number of Publications: 30

2. Andrew Jackson PhD (Associate Professor, Division of Twenty Dollars, \$XX,XXX)

Basic science researcher recruited in August 2004 as an Assistant Professor and promoted to Associate Professor in July 2012.

Basic Duties: This position involves research and teaching services as expected of a tenure track faculty member. Research time devoted to the general field of twenty dollar bills. An equitable role in the teaching activities of the Division of Twenty Dollars along with fellow conference.

Number of Awards: 16; Number of Publications: 81

3. Janet Yellen PhD (Associate Professor, Division of Federal Reserve, \$XX,XXX)

Psychology/social researcher recruited in August 2011 as a Visiting Associate Professor and appointed in June 2014 to her first faculty position.

Basic Duties: This position involves research and teaching services as expected of a tenure track faculty member.

Research time devoted to the general field of money and the federal reserve. An equitable role in the teaching activities of the Division of Federal Reserve along with guest lecturer attendance.

Number of Awards: 11; Number of Publications: 32

[BACK TO EQUITY](#)

Market

A. Market – Outside Offer (HRS Code 022)

The Department of DEPARTMENT requests a base pay increase for EMPLOYEE due to Market – Outside Offer.

EMPLOYEE received an outside offer for a comparable position from **[EMPLOYER OUTSIDE UW SYSTEM]**, for a base annual salary of \$45,000, which is higher than his/her current base annual salary of \$40,000. In order to retain this employee, we are requesting to increase his/her base annual salary to \$XX,XXX. This increase will match the outside offer [*OR: will not match the outside offer but will maintain equity in the Department and/or work within budgetary limitations*]. See attached evidence of offer [*examples: offer via letter, or offer via email*].

In his/her current position, EMPLOYEE's primary duties at UW include [*BRIEFLY describe primary duties of current position*]. These are similar to the duties proposed in the other position, which include [*BRIEFLY describe primary duties of other position*]. See attached evidence about the duties of the other position [*examples: job posting, or job description*].

EMPLOYEE consistently has excellent performance in his/her duties. We wish to retain the employee because [*LIST REASONS MAKING COUNTER OFFER DESIRABLE*]

In recommending this increase, the department studied the salary structure of the department, the external market and internal equity.

B. Market - Retention (HRS Code 081)

Example #1: All Employment Categories except Faculty

The Department of DEPARTMENT requests a base pay increase for EMPLOYEE due to Market – Retention.

[*PROVIDE SUMMARY OF THE RETENTION ISSUE; may include serious retention problem due to increased interest to take outside positions with comparable duties and responsibilities at higher level of pay (examples: applying/interviewing for positions outside*

UW; being actively recruited for positions outside UW); or recent pattern of employees in the same discipline/unit leaving to take positions outside UW.]

EMPLOYEE consistently has excellent performance in his/her duties. We wish to retain the employee because [*LIST REASONS FOR RETENTION*].

In recommending this increase, the department studied the salary structure of the department, the external market and internal equity.

Example #2: Faculty

Professor LAST NAME has exceeded expectations in the areas of research, teaching and service. Professor LAST NAME has recently been recruited by UNIVERSITY for a position as a member of their faculty. In an effort to convince Professor LAST NAME to end negotiations for a possible outside offer with UNIVERSITY, the departmental Executive Committee voted to make a preemptive retention offer which Dean LAST NAME authorized contingent on OHR approval.

In recommending this increase, the department studied the salary structure of the department, considered issues of equity and the prospect of future compensation opportunities and analyzed the recent history of raises, retentions, and unsuccessful retention efforts in the department as well as the current external market in order to set the final rate.

C. Market – Competitive (HRS Code 080)

Example #1: All Employment Categories except Faculty

The Department of DEPARTMENT requests a base pay increase for EMPLOYEE due to Market – Competitive.

Market data for TITLE in the Educomp Salary Survey (Public Doctoral \$1-\$10 billion budget) shows a median of \$85,000, well above EMPLOYEE’s rate of \$80,000. This gap in pay raises retention concerns for this position, and we request to increase EMPLOYEE’s base pay to \$XX,XXX to address this.

EMPLOYEE consistently has excellent performance and we wish to retain her. [*PROVIDE REASONS FOR RETENTION*]

In recommending this increase, the department studied the salary structure of the department, the external market and internal equity.

Example #2: Faculty

Professor NAME has exceeded all expectations as a faculty member in the Department of DEPARTMENT in the areas of research, teaching and service. His/Her service to the profession and department has been exemplary. [*PROVIDE EXAMPLES OF EXEMPLARY SERVICE, for example: He/She is a prolific scholar of AREA OF EXCELLENCE who has published extensively in his/her field. He/She is an excellent undergraduate teacher and taken the lead teaching courses that prepare our undergraduate students for careers and graduate students for the teaching profession.*]

With this increase, his/her pay rate will be at \$XX,XXX, below the 2015-16 AAUDE average of \$XX,XXX [*Note: OHR HAS AAUDE DATA*]. In recommending this increase, the department carefully studied the salary structure of the department, considered issues of equity and the prospect of future compensation opportunities and analyzed the recent history of raises and retention efforts in the department as well as the external market, in order to set the final rate.

[BACK TO MARKET](#)

Performance (Outside of Pay Plan) (HRS Code 091)

Performance adjustments no longer require or allow for an individualized justification. Instead employees must have a successful annual performance evaluation on file. Supervisors are required to be current on performance evaluations for staff prior to receiving a performance adjustment.

EMPLOYEE has a favorable annual performance evaluation on file, and has completed the required UW-Madison training on sexual harassment and violence prevention.

[BACK TO PERFORMANCE](#)

Permanent Change-in-Duties/Permanent Reclassification may or may not include Title Change (HRS Code 001)

Example #1: All Employment Categories except University Staff

The Department of DEPARTMENT requests a base pay increase [*If applicable: and a change in title from CURRENT TITLE to NEW PROPOSED TITLE*] for EMPLOYEE due to Permanent Change in Duties/Reclassification.

EMPLOYEE began employment as a CURRENT TITLE with UW Madison, Department of DEPARTMENT on DATE. The primary function of this position was [*LIST PRIMARY DUTIES/FUNCTION*].

EMPLOYEE has taken on new responsibilities.

1. [*Describe and list the new duties, and what changed to result in these new duties for this employee.*]
2. [*Explain how these new duties became associated with this person's position.*]
3. [*If New Title is proposed: Explain how the new duties are more appropriate with the title of NEW PROPOSED TITLE, and show and provide examples of how the employee meets criteria from Title Guidelines/Title Descriptions*]

These new duties represent significant additions and broaden the scope of this employee's position, and contribute to the success of our organization.

[*Note: The new duties must also be added into the "Duties" tab. Provide organizational chart if applicable.*]

Example #2: University Staff

[Under “Logical and Gradual Changes”] The Department of DEPARTMENT requests a base pay increase [*If applicable: and a change in title from CURRENT TITLE to NEW PROPOSED TITLE*] for EMPLOYEE due to Permanent Change in Duties/Reclassification.

EMPLOYEE began employment as a CURRENT TITLE with UW Madison, Department of DEPARTMENT on DATE. The primary function of this position was [*LIST PRIMARY DUTIES/FUNCTION*].

EMPLOYEE has taken on new responsibilities.

4. [*Describe and list the new duties, and what changed to result in these new duties for this employee.*]
5. [*Explain how these new duties became associated with this person's position.*]
6. [*If New Title is proposed: Explain how the new duties are more appropriate with the title of NEW PROPOSED TITLE, and show and provide examples of how the employee meets criteria from Title Guidelines/Title Descriptions*]

[Under “Reclassification Summary”] These new duties represent significant additions and broaden the scope of this employee’s position, and contribute to the success of our organization.

[*Note: The new duties must also be added into the “Duties” tab. Provide organizational chart if applicable.*]

[BACK TO PERMANENT CHANGE IN DUTIES](#)

Title and/or Range Change due to Promotion/Progression (HRS Code 003)

A. Faculty

Promotion from [choose one: Assistant Professor C40NN to Associate Professor C30NN; or Associate Professor C30NN to Professor C20NN] was approved by Dean and will become effective DATE. Documentation is stored at the school, college or division.

B. Limited

n/a – Limited titles are not in Promotion/Progression series (might be a permanent change in duties resulting in a new title)

C. Academic Staff

1. Category A Professional Academic Staff

A. Promotion to NO-PREFIX (must have at least one year of relevant, comparable, exempt-level experience)

The Department of DEPARTMENT requests a base pay increase and a change in title from CURRENT TITLE to NEW PROPOSED TITLE for EMPLOYEE due to promotion/progression.

EMPLOYEE began her/his employment with Department of DEPARTMENT on DATE. During this time, EMPLOYEE has achieved a level of competence and independence that are expected and appropriate of NEW PROPOSED TITLE.

EMPLOYEE has obtained experience and has developed considerable expertise in her/his work on LIST DUTIES/AREAS OF FOCUS. Additionally, EMPLOYEE works independently in applying approaches, processes, methods and techniques and has been active in assisting with the development of new approaches as evidenced by [*LIST AN EXAMPLE OR TWO*].

B. Promotion to SENIOR (must have 7 years of relevant, comparable, exempt-level experience)

The Department of DEPARTMENT requests a base pay increase and a change in title from CURRENT TITLE to NEW PROPOSED TITLE for EMPLOYEE due to promotion/progression.

EMPLOYEE began her/his employment with Department of DEPARTMENT on DATE. *[IF EMPLOYEE DOES NOT HAVE THE REQUIRED YEARS OF EXPERIENCE IN POSITIONS AT UW: Additionally, EMPLOYEE has previous relevant work experience at LAST EMPLOYER performing similar DUTIES. (Provide Resume)]*. During this time, EMPLOYEE has had a consistent record of exemplary performance, as evidenced by performance evaluations, and has achieved a level of competence and independence that are expected and appropriate of NEW PROPOSED TITLE.

EMPLOYEE has obtained extensive experience, operates at a high level of proficiency and has advanced knowledge and skills. EMPLOYEE develops new approaches, processes, methods and techniques that has been evidenced by *[PROVIDE EXAMPLES OF WORK]*. EMPLOYEE is expected to cope independently with new and unexpected complex situations. *[IF APPLICABLE: EXPLAIN HOW EMPLOYEE GUIDES/TRAINS OTHER EMPLOYEES.]*

2. Distinguished Prefix – selected Category A or B Academic Staff

Distinguished prefix nomination packet was sent to the Secretary of the Academic Staff for evaluation by the Distinguished Prefix Review Committee.

3. All other Academic Staff

The Department of DEPARTMENT requests a base pay increase and a change in title from CURRENT TITLE to NEW PROPOSED TITLE for EMPLOYEE due to promotion/progression.

EMPLOYEE began her/his employment with Department of DEPARTMENT on DATE.

[SHOW AND PROVIDE EXAMPLES OF HOW EMPLOYEE MEETS CRITERIA FROM TITLE GUIDELINES, FOR PROPOSED LEVEL: <https://www.ohr.wisc.edu/polproced/UTG/CritPrefixScopLevl.html>]

[BACK TO TITLE OR RATE CHANGE/PROMOTION](#)

Temporary Change-in-Duties (HRS Code 025)

Example #1: All Employment Categories except University Staff

The Department of DEPARTMENT requests a base pay increase for EMPLOYEE due to Temporary Change in Duties.

EMPLOYEE began his/her appointment with Department of DEPARTMENT on DATE. The primary function of this position was [*LIST PRIMARY DUTIES/FUNCTIONS*]. EMPLOYEE has taken on new responsibilities that represent a substantial qualitative change in the position.

EMPLOYEE'S new duties include [*BRIEFLY LIST NEW DUTIES AND EXPLAIN HOW THEY CAME TO BE*].

[*Note: these new duties must also be added into the "Duties" tab in the position description. Provide organizational chart if applicable.*]

Example #2: University Staff

Under "Logical and Gradual Changes": The Department of DEPARTMENT requests a base pay increase for EMPLOYEE due to Temporary Change in Duties. EMPLOYEE began his/her appointment with Department of DEPARTMENT on DATE. The primary function of this position was LIST PRIMARY DUTIES/FUNCTIONS. EMPLOYEE has taken on new responsibilities that represent a substantial qualitative change in the position.

Under “Reclassification Summary”: EMPLOYEE’S new duties include [*BRIEFLY LIST NEW DUTIES AND EXPLAIN HOW THEY CAME TO BE*].

[*Note: these new duties must also be added into the “Duties” tab in the position description. Provide organizational chart if applicable.*]

[BACK TO TEMPORARY CHANGE IN DUTIES](#)