

# IP&O Employee Services

## Strategic Organizational Support (SOS)

### Standard Operation Procedures with Workflows

Updated March 31, 2025

#### STRATEGIC ORGANIZATIONAL SUPPORT OVERVIEW

Within Employee Services, there are two units designed to support IP&O departments, Supervisors and Hiring Managers throughout the lifecycle of their IP&O employees. The units are: [Transactional Employee Lifecycle \(TEL\)](#) and **Strategic Organizational Support (SOS)**.

This document provides clear guidelines and procedures for managing the **Strategic Organizational Support (SOS)** functions within the IP&O division, ensuring alignment with strategic goals, efficient operations, and effective support for staff and management.

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**SECTION 1: PRE-TRANSACTIONAL DEPARTMENTAL STRATEGIC PLANNING**

One of the goals of the Employee Services Strategic Organizational Support (SOS) unit is to review all complex requests and to secure approvals from all applicable parties prior to official submission to UHR. Approvals may need to come from the ELT group, Office of General Counsel, Office of Labor Relations, representatives from Aligned organizations, as well as our UHR Business Partner. The intent is to ensure that each request is accompanied by all required supporting documentation and approvals. Once all approvals have been secured from all applicable university groups, only then will requests be processed by the [Transactional Employee Lifecycle \(TEL\)](#) unit who have the responsibility of submitting these requests into the UHR ROCS system. We hope by securing approvals in advance of UHR submissions, transactions will move forward without interruption or challenge.

The SOS Unit will review requests for the following types of transactional requests. This process is considered “**Pre-Transactional**” activity:

A. <a href="#">Reclassification</a>	Supervisor Initiated
	Self-Initiated
B. <a href="#">In-Grade Salary Adjustment</a>	Additional Duties
	Counter-Offer
	<a href="#">Equity Review</a>
C. <a href="#">New Position or Job Description Development</a>	
D. <a href="#">Revised CARF or Job Description Development</a>	

**1. Descriptions**

**A. RECLASSIFICATION QUALIFICATIONS & DEFINITIONS**

The Reclassification definition and who can request a Reclassification is listed below:

**1. SUPERVISOR INITIATED RECLASSIFICATION**

If a position has undergone change because the supervisor has added, deleted, or changed the duties and responsibilities resulting in significant change in terms of scope, level of responsibility, accountability, and/or impact, the position may be reviewed to ensure appropriate classification.

**2. SELF-INITIATED RECLASSIFICATION**

MPSC and URA-AFT Employees may submit a self-initiated reclassification request with the required documentation through the [UHR ONESource portal](#).

## **B. SALARY IN-GRADE ADJUSTMENT QUALIFICATIONS & DEFINITIONS**

A salary In-range or Grade may be requested for any of the 3 reasons listed below. Refer to [Rutgers Policy 60.4.10](#) or the applicable collective negotiations agreement for additional guidance.

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### **1. ADDITIONAL DUTIES REVIEW**

When job duties significantly change, and the employee's scope, depth and complexity of work includes permanent additional responsibilities that become a regular part of the job which do not warrant an upward reclassification of the employee's grade. Salary adjustment cannot exceed 10% without a policy exception requiring the Senior Vice President for Human Resources approval. Please note: an increase in the volume of activity or transactions without additional duties does not justify additional pay or increase in pay.

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### **2. COUNTEROFFER REQUEST AND REVIEW**

Counteroffers are considered when an employee has received a written external employment offer where the external position is at a comparable level to the employee's current position at Rutgers and within a comparable job market, and a counteroffer would not result in internal equity issues within the requesting department.

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### **3. EQUITY REVIEW**

Equity Reviews are used to address salary inequities among individuals who are in positions that require similar skills, responsibilities and experience. Equity reviews may also be requested to address pay compression, pay inequity, or to ensure that an employee's salary appropriately reflects his/her skills, knowledge, experience, and performance. They are also considered to provide for an equity adjustment because of substantiated internal and/or external market conditions.

## **C. NEW POSITION CARF OR JOB DESCRIPTION DEVELOPMENT JUSTIFICATION**

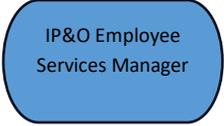
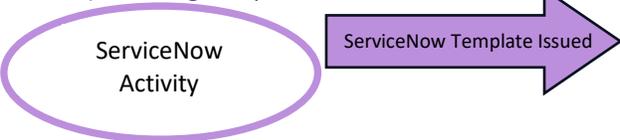
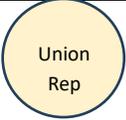
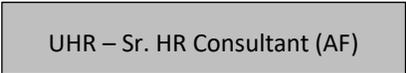
When the creation of a new position is approved and authorized by the department head and IP&O Budget and Finance, a new CARF or Job Description must be developed which includes the major duties, responsibilities, qualifications, and the reporting relationships for the new position.

## **D. REVISED CARF OR JOB DESCRIPTION DEVELOPMENT JUSTIFICATION**

If department responsibilities are modified, eliminated or increased, CARF's and Job Descriptions must change as well. Meeting with the SOS team is required to determine if a Reclassification or an In-grade adjustment is required.

## 2. The Pre-Transactional Process Legend

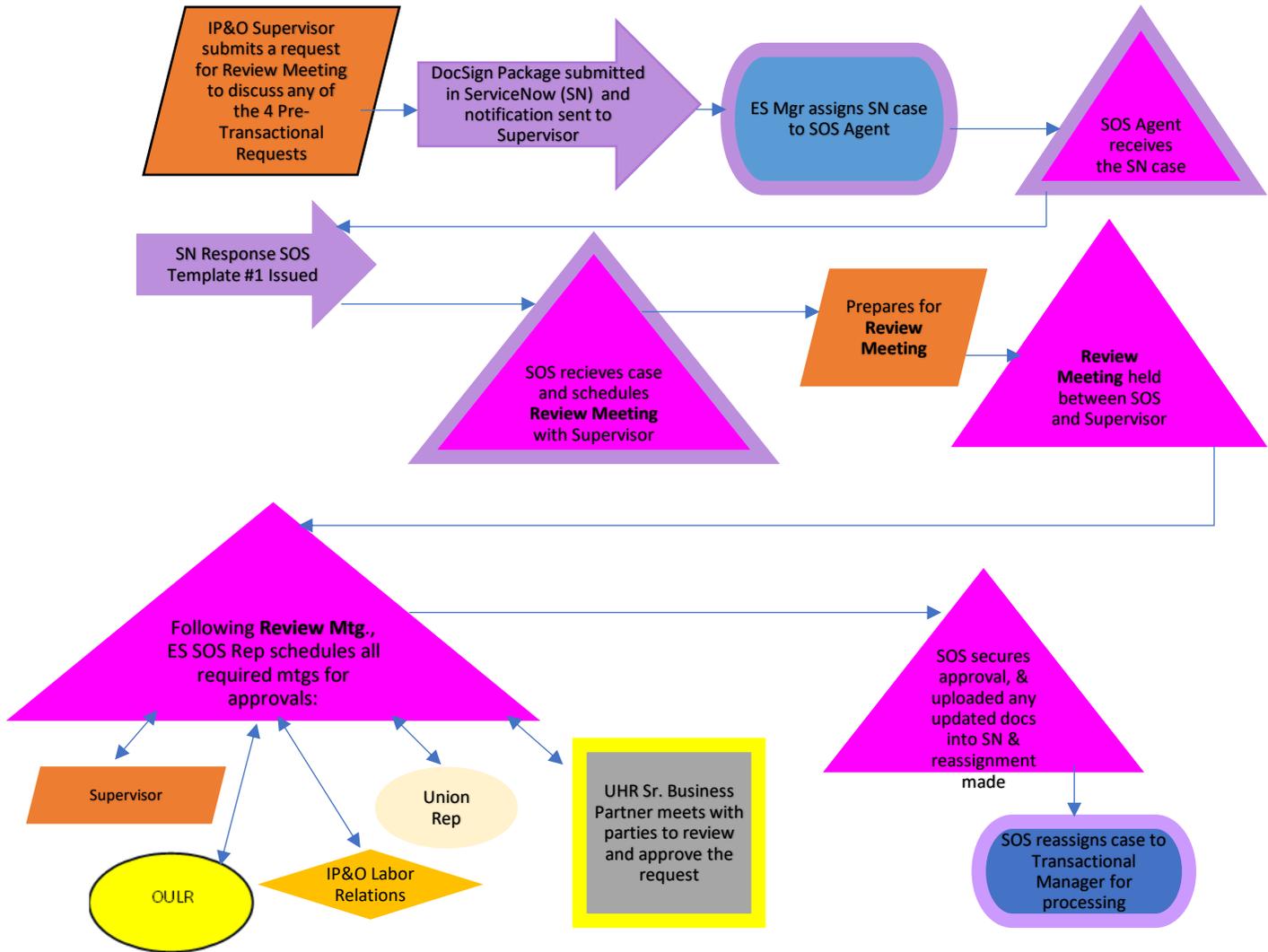
The table below reflects the various groups who are involved with the review of pre-transactional requests.

<p>Orange = IP&amp;O Department (IP&amp;O Hiring Manager)</p>  <p>IP&amp;O Hiring Manager or Supervisor</p>	<p>Gold = IP&amp;O Employee Relations</p>  <p>IP&amp;O Labor Relations</p>
<p>Pink = IP&amp;O ES Strategic Organizational Support (SOS)</p>  <p>IP&amp;O ES SOS</p>	<p>Green = IP&amp;O ES Transactional Employee Lifecycle</p>  <p>IP&amp;O ES Transactional Lifecycle</p>
<p>Blue = IP&amp;OP ES Transactional Manager</p>  <p>IP&amp;O Employee Services Manager</p>	<p>Purple = ServiceNow (SN) Software Action (Arrow and Outline) including Template Information</p>  <p>ServiceNow Activity</p> <p>ServiceNow Template Issued</p>
<p>Tan = Union Representatives</p>  <p>Union Rep</p>	<p>Green = Office of Labor Relations (OULR)</p>  <p>OULR</p>
<p>Grey = RU UHR</p>  <p>UHR – Sr. HR Consultant (AF)</p>	<p>Aqua = Comp Services</p>  <p>Compensation Services</p>

**3. The Pre-Transactional Workflow for:**

- A. Reclassifications
- B. Salary In-Grade Adjustments
- C. New Position or Job Description Development
- D. Revised CARF or Job Description Development

**ES SOS Request Workflow:**



### 3. Pre-Transaction Standard Operating Procedure Steps

#### a. IP&O Department Supervisor Responsibilities:

1. Assemble the applicable DocuSign form and any required additional documentation and submit the Package using ServiceNow.
2. Some of the DocuSign forms will require the approval from the EVP & COO.
3. Form requirements for each type of review are referenced below in the table

IP&O Supervisor assembles the applicable DocuSign Package for any of the 5 Pre-Transactional Processes

	Type of Request	Type of DocuSign Form	Existing <a href="#">CARF</a> or JD with Track Change	Existing <a href="#">CARF</a> or JD only	New JD or <a href="#">CARF</a>	Resume	Org Chart	Comp Services Memo	<a href="#">Justification Memo</a>	Offer Letter
<b>A. Reclass</b>	Reclass for RU URA & MPSC	<a href="#">Reclassification/ In grade or Classify a new Position Request Approval DocuSign Form</a>	X		X	X	X	N/A	X	N/A
	Reclass for RBHS	<a href="#">Reclassification/ In grade or Classify a new Position Request Approval DocuSign Form</a>	X		X	X	X	X	X	N/A
<b>B. In-Grade Salary Adjustment</b>	Additional Duties (RU Legacy only)	<a href="#">Reclassification/ In grade or Classify a new Position Request Approval DocuSign Form</a>	X		N/A	X	X	N/A	X	N/A
	Counter-Offer	<a href="#">Reclassification/ In grade or Classify a new Position Request Approval DocuSign Form (select Counteroffer)</a>	X		N/A	X	X	N/A	X	From the external party
	Equity Review	<a href="#">Equity Review Request DocuSign Form</a>	N/A	X	N/A	X	X	N/A	X	N/A
<b>C. New Position or Job Description Development (RU Legacy only)</b>		<a href="#">Reclassification/ In grade or Classify a new Position Request Approval DocuSign Form</a>	N/A		X	N/A	X	N/A	X	N/A
<b>D. Revised <a href="#">CARF</a> or Job Description Development (RU Legacy only)</b>		<a href="#">Reclassification/ In grade or Classify a new Position Request Approval DocuSign Form</a>	X		N/A	N/A	X	N/A	X	N/A

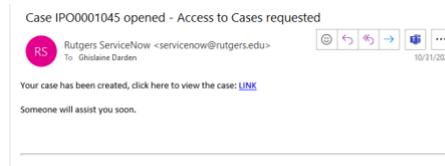
4. Verify that you are requesting the correct transaction by reviewing the definitions for all **Pre-Transactional** types of possible requests, see the narratives above.

5. To submit your request, the Supervisor or designee is required to open the ServiceNow portal and:

- a) Selects Category: Employee Services: *Strategic Organizational Support*
- b) Opens a case and fills out the form
- c) Attach the required forms to your DocuSign envelope (as per #2 in the table above) and clicks submit.
- d) A case number will be assigned and is auto assigned to Employee Services
- e) An automated SN response is issued to the Internal User (Requestor):



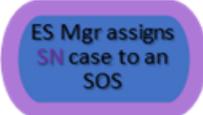
DocuSign Package submitted in ServiceNow (SN) Request - SN notification



- f) Within 2 days, your case will be assigned by Employee Services Manager to the SOS unit

**b. Employee Services Manager Responsibilities:**

1. ES Manager receives all auto-assigned cases.
2. Makes assignments within 2 days of receipt of the SN case to SOS Agent for action.
3. ServiceNow Training materials are hosted in the link below:



ES Mgr assigns SN case to an SOS

[https://trl.ipu.rutgers.edu/cas/user\\_guides\\_and\\_course\\_materials/phase\\_one\\_servicenow/Phase\\_1\\_servicenow\\_user\\_guide.pdf](https://trl.ipu.rutgers.edu/cas/user_guides_and_course_materials/phase_one_servicenow/Phase_1_servicenow_user_guide.pdf)

**c. Employee Services SOS Agent Responsibilities:**

1. ES SOS agent received the SN Case and issues a SN Response SOS Template #1 is issued.



SN Response SOS Template #1 Issued

**SOS Template #1 – Review Meeting:**

○ **Initial Response to Internal User:**

Dear *Internal User*,

Thank you for your inquiry. The Strategic Organizational Support (SOS) team will review your attached information and schedule a **“Review Meeting”** to discuss with you. Please provide a few available dates and times so that a **Review Meeting** can be scheduled.

Thank you,

XXX

2. ES SOS group will review all submitted documents.
  
3. ES SOS will schedule a **Review Meeting** with Hiring Manager to verify and discuss the specific needs and/or requests and provide clarification regarding any of the transactions listed below:



A. <a href="#">Reclassification</a>	Supervisor Initiated
	Self-Initiated
B. <a href="#">In-Grade Salary Adjustment</a>	Additional Duties
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**d. IP&O Department Supervisor Responsibilities:**

1. Supervisors must come prepared for the **Review Meeting** by reviewing the following conditions and criteria:
  - A. **For the Reclassification Review Meeting:**
    - Bring a list of specific duties that have been or will be added on by the supervisor
    - These added or removed duties have resulted in significant change in terms of scope, level of responsibility, accountability, and/or impact.



- These duties are currently not included in the employee’s CARF or Job Description or in another CARF or Job Description
- This category impacts title, job code and responsibilities only.
- An Employee may self-initiate a request but is supported by the Supervisor.
- The goal will ultimately be to edit the existing CARF with track changes and create a new CARF to reflect the new duties and tasks.

**B. For the In-Grade Salary Adjustment Review Meeting:**

- There are 3 reasons why an in-grade salary adjustment is made, and the employee must satisfy one of the those conditions (see definitions on page 3) in order to be eligible for an in-Grade salary adjustment.
- With counteroffer requests, many factors are taken into consideration so that Internal Equity is not disrupted.
- Equity Reviews may consider the following:
  - Salary reports may be requested by the Supervisor to assess equity.
  - Pay disparity amongst equivalent job positions within the team to ensure fair compensation practices
  - A request to complete an internal analysis to make an offer for a new hire, transfer, or internal promotion.
  - Identify Bias-to address any hiring or promotional concerns
  - Workload distribution

**C. For New Position CARF or Job Description Development Review Meeting:**

- Bring an Org Chart reflecting how the new position will support the organization
- Bring a proposed CARF detailing the Job Summary and Duties
- Bring details if an existing position is being deactivated and is being replaced by the *New* position reflected on the Org Chart
- Verify that funding has been approved for the role

**D. For a Revised CARF or Job Description Development Justification Review Meeting:**

- Bring a proposed CARF which clearly details the changes to the job duties, using the track changes functionality.
- Bring an org chart identifying the proposed revised org structure
- Bring the Justification Memo, which summarizes the required changes

**e. Review Meeting: IP&O Department Supervisor and Employee Services SOS Agent**

1. During the meeting all applicable documentation will be reviewed to ensure that applicable forms and information have been collected.
2. The ES SOS Agent must have a comprehensive understanding of the request and understands how best to secure UHR approvals.



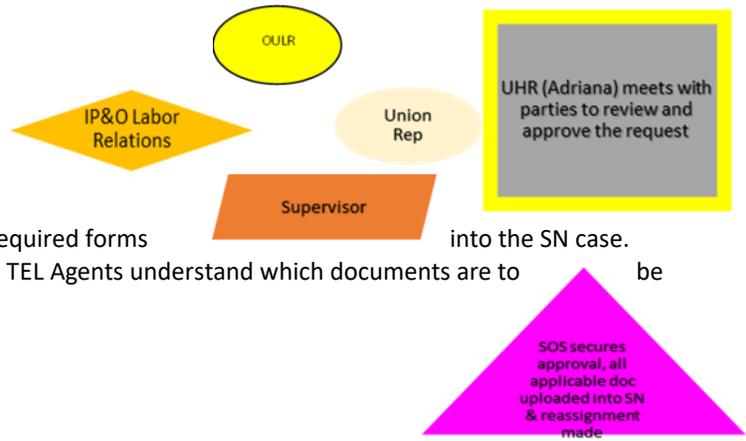
**f. Employee Services SOS Agent Responsibilities**

1. During the **Review Meeting** it is determined that additional information and or clarification is required before approvals are granted.
2. All required parties or as needed are consulted to determine the feasibility of the request. Potential groups include:



- a. Union Reps
- b. IP&O Labor Relations
- c. OULR
- d. UHR Sr. Business Partner
- e. Supervisor

- 3. All applicable documentation must be secured and reviewed by all required parties
- 4. Approvals are secured by all applicable groups
- 5. Upload all **finalized** and approved documents and/or required forms into the SN case. Document files must be renamed "*Final....*" so that the TEL Agents understand which documents are to be uploaded into ROCS.



- 6. Case is reassigned to the TEL group for processing

