THE UNIVERSITY OF ARIZONA
Human Resources

Incumbent Review Form

Revision Date: 8/1/2023

The incumbent review process can take up to 30 calendar days from the date it is received by Compensation. Please note if the requested change results in any pay change the effective date will default to the first day of the next pay period in which the request was processed.

UAccess Incumbent Review: *Manager Self Service > Request MSS Transactions Tile > MSS Exceptions > MSS Exception Request > Create New MSS Exception Request and select "Incumbent Review" from the dropdown menu for the transaction type*

Required Attachments:
- Incumbent Review Request Form
- Position Description Form
- Employee's Resume/CV (employee must meet the minimum qualifications of the position being requested)

Guidelines

Please discuss the incumbent review with your Senior HR Partner in advance.

Type	Definition	Compensation	Recruitment
Promotion Guidelines	Movement of an employee to a job that is in a higher pay grade than the employee's current job.	You may provide a 5-15% per pay grade increase	You can promote an employee if the following conditions are met. You are promoting the employee: • To the next pay grade, unless the position is the next available title within the job family. • To the next career level, unless the position is the next available title within the job family. • Once in a rolling calendar year. • To a position within their current assigned unit. • To a position within their current job function. • After completing six months within their current position. • Who was hired on a competitive basis.
Lateral Guidelines	Movement of an employee to a job that is assigned to the same pay grade as the employee's current job.	You may provide up to a 5% pay increase	You can transfer an employee if the following conditions are met. You are transferring the employee: • To a position within their current assigned unit. • To a position within their current job function. • Who was hired on a competitive basis.

Incumbent Information

Employee Name: _____ **Position #:** _____

Working Title: _____ **FTE:** _____

Date in Current Job: _____ **ABOR Code:*** _____

Original Hire Competitive: ☐Yes ☐No **If Yes, Req #:** _____

* Classified Staff will be required to transition to University Staff.

Is employee on an H1B sponsorship: ☐Yes* ☐No   **Please work with SR HR Partner.*

Department #: _____ **Department Name:** _____

College/Division ID: _____ **College/Division Name:** _____

Supervisor Name: _____ **Supervisor Title:** _____

Request Details

Current		Requested	
Job Code:		**Job Code:**	
Job Title:		**Job Title:**	
Function:		**Function:**	
Family:		**Family:**	
Career Level:		**Career Level:**	
Pay Grade:		**Pay Grade:**	
Min:		**Min:**	
Mid:		**Mid:**	
Max:		**Max:**	

Position Mapping (Job Library)

Current Rate:		**$ Increase:**	
Requested Rate:		**% Increase:**	

Colleges/Divisions are responsible for ensuring compensation decisions are competitive, equitable, and meet regulatory standards. The Compensation Administration Guidelines should be taken into consideration when any pay decision is made. Colleges/Division should take into account any budgetary constraints as well as the education, experience, knowledge, and skills of the individual and place them within the pay range appropriately while also taking into consideration internal equity within the department, college/division, and the University.

All employees within the unit who are in the same job family and career stream/level as the employee who has been identified for the incumbent review should be assessed. Please list those employees below and provide a justification describing why the selected employee was chosen over the other employees mapped similarly. Reasonable justifications will include an assessment based on factors such as education, experience, time in the job, performance, and interest in the position.

Employee Name	Job Title

If additional space is needed, please provide a complete list or report as a separate attachment.

Explanation:

Please confirm the following:

☐ The incumbent meets the minimum qualifications of the requested position.

☐ Compensation Administration Guidelines were taken into consideration and the requested rate is based on the incumbent's education, experience, knowledge, and skill that exceed the minimum requirements of the job.

☐ A review of internal equity within the department, college/division, and University has been completed.

Resources

- Recruitment Administration Guidelines
- Compensation Administration Guidelines
- Managing with Pay Ranges (Page 8)
- Transition to University Staff Form
- Job Library
- UAccess Analytics Salary Comparison Tool