

The University of Wisconsin System
UPS OPERATIONAL POLICY: HR 8



SUBJECT: Title Change

Original Issuance Date: July 1, 2015

Last Revision Date:

1. POLICY PURPOSE:

The purpose of this policy is to provide the basis for a title change of a filled position for all employee categories.

2. POLICY BACKGROUND:

UPG #1 identified unclassified title definitions and levels associated with those titles. It also provided guidelines related to title changes of filled positions as a result of job reclassification (major changes in duties) and promotion/career progression (greater experience, expertise, and applied ability in a particular specialty area).

Historically the title of a filled classified permanent position could only be changed when specific criteria regarding duties and responsibilities of the position and the incumbent are met or under other limited circumstances such as creation of new titles. Wis. Stat. § 230.09(2) and Chapter ER 3 of the Wisconsin Administrative Code describe reclassification and reallocation transactions for classified positions that change the title of a filled position when the actual job duties and responsibilities no longer match the title.

3. POLICY DEFINITIONS:

Please see the Definitions Operational Policy for a list of general terms and definitions.

Definitions specific to this policy:

“Official title”: The title assigned to a position that describes a single position or a group of positions that possesses substantially similar (though not identical) duties and responsibilities.

“Working title”: A variation from the official title, that is given to a position in order to better describe its particular functions.

4. POLICY:

On behalf of the System President, the UW System Administration, Office of Human Resources and Workforce Diversity has the responsibility to monitor and maintain the official title and

salary grade structure. Official titles shall be assigned on the basis of functions performed in the position to ensure that the title structure is consistently applied among the institutions. Questions regarding appropriate use of titles will be brought to the attention of the institution.

Title Changes: Positions are assigned official titles based on position functions. The purpose of establishing an official title for each position or group of positions is to permit comparability of substantially similar positions across institutions and academic and administrative units. To ensure that titles assigned to filled positions are consistent and accurate, the review of formal title assignments will be on an ongoing basis and will be based on current position descriptions. The title change of a filled position may occur as a result of a substantive change in duties or progression within a title series. When functions of a filled position evolve over time such that the current title is no longer the “best fit”, or the incumbent gains a certain level of experience, a title change of the filled position may result. This process is identified either as a job re-titling, or a promotion/progression.

Re-titling as a result of a change in duties: Re-titling of a position occurs when there has been a substantive change in the duties and/or scope of responsibilities. The position has evolved over time, and the changes must be related to, or an extension of, the functions initially assigned to a position. Examples of such a title change would be University Services Associate 1 to University Services Associate 2 within University Staff title structure, or Administrative Specialist to Administrative Program Specialist within the Academic Staff title structure.

Promotion/Career Progression: Promotion/career progression is natural advancement within the area of specialty of the position, based on the incumbent’s successively greater experience, expertise, applied ability and responsibility within the title series. While there is an expectation that the position and incumbent will progress through different levels associated with the title series, the specific criteria and timeframes for progression may vary depending upon the functions of the position. Examples of such a title changes within the Academic Staff title structure would be an Associate Student Services Coordinator to a Student Services Coordinator (no prefix); or an Accountant to an Accountant Journey.

As a general rule, formal re-titling as a result of a change in duties may take effect at appropriate times throughout the fiscal year. However, to the extent possible, formal title changes that reflect usual career progress in the specialty area should coincide with the annual budget process. Retroactive salary adjustments for personnel transactions are prohibited. However, the institution may establish a personnel transaction policy that establishes an effective date based on the date that documented materials are received by an appointing authority or office.

The title of a filled position also may change as a result of the following:

Voluntary Reassignment of Formerly Classified FLSA-Exempt Employee to Academic Staff/Limited Position: A voluntary reassignment to an Academic Staff/Limited position may result in a title change. See UPS OP-TR3 for additional details.

Creation of New Titles as a Result of a Survey or Study: When new titles and title definitions are created as a result of a survey or study, filled positions with functions related to a new title are reviewed. If following the review, a new title and title definition better fits the responsibilities of the position, the title of the filled position is changed.

Working Title: As a reflection of differences in position responsibilities, organizational structures and institutions, official titles are defined in general terms. Therefore, institutions may find it useful or necessary to establish informal working titles to describe positions.

Addition/Deletion or Modification to the Official Title Structure: The use of working titles may not offer an adequate response to emerging needs amongst the institutions. Therefore, institutions may request additions, deletions or modifications to the official title structure. Institution proposals to amend the official title structure should be submitted to the UW System Administration, Office of Human Resources and Workforce Diversity.

Appeal Process: An appeal mechanism should be established at each institution to resolve disagreements regarding official title changes. The appeal process may be designed to meet the particular organizational needs and governance structures of the institution.

As required by Regent Resolution #5980, UW System Administration will exercise its authority to resolve title assignment problems in the event a satisfactory solution cannot be achieved at the institution level.

5. RELATED DOCUMENTS:

Wis. Stat. Chapter 36 University of Wisconsin System
Operational Policy TC1: Recruitment Policies and Procedures
Operational Policy TC2: Title Definitions
Operational Policy TC3: Compensation
Operational Policy TR3: Voluntary Reassignment of Formerly Classified FLSA-Exempt Employees to Academic Staff/Limited Positions

6. POLICY HISTORY:

Wis. Stats. § [230.09 \(2\), Classification](#)
Wis. Admin. Code § [ER 2.04 \(2\), Classification plan](#)
Wis. Admin. Code § [ER 3.03 \(1\), Position classification actions](#)