

For Manager and Supervisor use only

Department: _____ Supervisor: _____

Position Title: _____ Department Head: _____

Employee Name: _____ Review date: _____

The purpose of this questionnaire is to capture relevant position information that will facilitate the determination of FLSA status by Human Resources and legal counsel. It is not designed to collect all of the details regarding the position. Please attach an updated job description and an updated organizational chart.

1. Independent Judgment and Discretion:

Provide detailed examples of activities and the percentage of time spent that demonstrate the use of independent judgment and discretion. Use the FLSA reference guidelines at the end of this document to identify the activities to describe. List the FLSA guideline number with the corresponding description of activity. Use additional paper if necessary. Important: Each activity listed should represent a maximum of 30% of time. The %s of time spent for each activity listed should correspond to those in the Job Profile. In some cases, no activities will be listed.

<i>FLSA Guideline # (from list on next</i>	<i>Activities: Description of activities that the employee conducts that exemplify that guideline</i>	<i>% of time spent</i>

2. Supervisory/ Managerial Responsibilities:

Use this section to provide examples of supervisory/managerial activities. Use the FLSA reference guidelines at the end of this document to identify the activities to describe. List the FLSA guideline number with the corresponding description of activity. Use additional paper if necessary.

<i>FLSA Guideline # (from list on next page)</i>	<i>Activities: Description of activities that the employee conducts that exemplify that guideline</i>	<i>% of time spent</i>

3. Computer Systems Design and Development (if applicable):

Use this section to provide examples of computer systems design and development. Use the FLSA reference guidelines at the end of this document to identify the activities to describe. List the FLSA guideline number with the corresponding description of activity. Use additional paper if necessary.

<i>FLSA Guideline # (from list on next page)</i>	<i>Activities: Description of activities that the employee conducts that exemplify that guideline</i>	<i>% of time spent</i>

4. Background & Experience Requirements:

<i>Is a particular academic degree, license, certification or specialized training required? Describe.</i>
<i>How much and what type of relevant work experience is required to be able to successfully perform this position?</i>

5. Additional Information:

<i>Please add any information that is important about the position not covered above, e.g., unique skill set?</i>
<i>Does this position regularly work over 40 hours/week? If yes, how frequently is overtime (over 40 hours) worked?</i>

Reference Guidelines

FLSA Guidelines relative to Independent Judgment and Discretion

1. Authority to formulate, affect, interpret, or implement management policies or operating practices;
2. Carries out major assignments in conducting the operations of the business;
3. Performs work that affects business operations to a substantial degree, even if the employee's assignments are related to operation of a particular segment of the business;
4. Authority to commit employer in matters that have significant financial impact;
5. Authority to waive or deviate from established policies and procedures without prior approval;
6. Authority to negotiate and bind the organization on significant matters;
7. Provides consultation or expert advice to management;
8. Involved in planning long- or short-term business objectives;
9. Investigates and resolves matters of significance on behalf of management;
10. Represents the organization in handling complaints, arbitrating disputes, or resolving grievances

NOTE: According to the FLSA "Independent Judgment and Discretion" is NOT:

- Applying knowledge, following prescribed procedures, or determining which procedures to follow.
- Determining whether specified standards have been satisfied, even if there is some leeway in reaching a conclusion.
- Performing inspection functions by following established techniques and procedures with skills acquired through special training or experience.
- Formulating recommendations based upon the development of facts concerning conformity with a known standard.
- Comparing items based upon established standards, known through experience or manuals.
- Screening applicants or conducting interviews to determine satisfaction of certain minimum qualifications.
- Making decisions that do not commit the employer in substantial respects financially or otherwise.
- Having access to confidential data.

FLSA Activities relative to Supervisory / Managerial Responsibilities

1. Supervises two or more Full-Time Equivalent employees (FTE's). *Must be regular employees. Overseeing the work of student workers, contract employees, temporary workers, and consultants does not meet the definition of supervision.*
2. Has the authority to hire, fire, promote or otherwise change the status of other employees (or his/her suggestions and recommendations have particular weight). Documentation regarding these actions supports the position's involvement.
3. Primary duty is to manage a recognized organization or business unit (Note: please identify and define the unit).

FLSA Guidelines relative to Computer Systems Design and Development

1. Application of systems analysis techniques and procedures, including consulting with users to determine hardware, software, or system functional specifications.
2. Design, development, documentation, analysis, creation, testing, or modification of computer systems or programs, including prototypes, based on and related to user or system design specifications.
3. Design, documentation, testing, creation, or modification of computer programs related to machine operating systems.

NOTE: According to the FLSA Guidelines, "Computer Systems and Design" is NOT:

- The repair of computer hardware or related equipment.
- Work that is highly dependent upon, or facilitated by the use of computers and computer software program.