

Subject: MODIFIED CLASSIFICATION REVIEW (MCR)

REFERENCES	SECTIONS
Classification and Pay (C & P) Guide	300, 320, 600
Pay Scales http://www.calhr.ca.gov/state-hr-professionals/Pages/pay-scales.aspx	13, 15
Responsible Control Agency and Program http://www.calhr.ca.gov/Pages/home.aspx	CalHR
Other:	
Personnel Action Manual (PAM)	2.57

Modified Classification Review (MCR)

Definition/ Explanation

Modified Classification Review (MCR) refers to a program of decentralization of the position allocation process. Under this program, departments may be authorized to establish new positions, reclassify existing positions, and/or refill vacancies in certain classifications without prior classification review by the California Department of Human Resources (CalHR). The allocation of positions, to approve classifications, is based on the classification specifications and other information, as it is available, such as, allocation standards or guides, level descriptions, and staffing patterns.

The DGS has full delegation from the CalHR to establish new positions, reclassify existing positions, and/or refill vacancies without prior classification review by the CalHR. However, the following MCR designation applications are applicable to DGS. It is advised that the CalHR is consulted prior to approving the allocation, if it is questionable, to avoid any misallocation determinations by CalHR as a result of an audit.

MCR I

MCR I classifications are considered to have duties and responsibilities sufficiently distinct from other classifications, or to have sufficiently well defined specifications, allocation standards or guides that relatively few problems should be encountered in making allocations. These classifications are typically working level classifications; therefore, would not have significant organizational implications.

MCR II

MCR II designates classifications where the standards are not as sufficiently well defined as classifications designated MCR I. The initial allocation of positions to classifications designated MCR II require CalHR staff approval; however, prior classification review is not necessary when a vacant position is being refilled, providing there has not been any substantial change in duties since the position was originally classified. However, if there are significant changes that occur in a position (filled or unfilled), a revised 625 should be submitted to CalHR for approval for the following classifications:

- Staff Services Manager I
- Staff Services Manager II (Managerial)
- Staff Services Manager II (Supervisory)
- Staff Services Manager III

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Modified Classification Review (MCR), Continued

**Definition/
Explanation**
(continued)

MCR NONE

Classifications designated MCR NONE have been deemed inappropriate for delegation. These classifications require prior classification review by CalHR staff. All “managerial” designated classifications are excluded from placement on MCR. Specialists, supervisory, and one-position classifications, the filling of which is likely to have important organizational implication, are typically excluded from placement on MCR. Classifications or classification series, which are under study for revision, are also excluded from MCR I or II. The following classifications require prior CalHR approval:

- Data Processing Manager IV
- Labor Relations Specialist
- Labor Relations Manager I
- Labor Relations Manager II
- Staff Counsel IV

Procedure

Regardless the DGS has delegation for position allocation, excluding the classifications listed above, the following table identifies the requirements that the Classification and Pay (C&P) Analyst must consider prior to approving a Request for Personnel Action (RPA).

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Modified Classification Review (MCR), Continued

Procedure
(continued)

	MCR	Duty Statements	Organization Charts	Justification
Initial Allocation	2 None	Criteria for all duty statements	Criteria for all organization charts	Criteria for justification
Refill of Positions (no change in duties)	None	<ul style="list-style-type: none"> Describe current duties and include % or frequency of breakdowns Add qualifying statements to differentiate areas or responsibility if more than one position in unit performs similar duties Avoid ambiguous words such as complex, coordinates, etc. (describe how job is complex) Whenever possible, relevant factors to the position should be quantified (size of the budget, number of clients, etc.) Some allocation guides such as data processing and business services classes have specific criteria and forms to be filled out. 	<ul style="list-style-type: none"> Current and dated Signed by top management Reflect all budgeted positions Full titles Fractional time bases Actual upward and downward reporting relationships Indicated whether positions are filled or vacant Highlight position being reviewed 	<ul style="list-style-type: none"> Provide relevant background Discuss how the proposed class satisfies the spec and/or standards of the class Describe how duties of the position fit into the role of the unit or mission of the department
Refill of Positions (change in duties)	2 None	Include both current and proposed duty statements	Include both current and proposed organization charts if the organizational structure is to be changed	Discuss "What has changed?" (organizational mission, workload, structure, etc.)
Upward Reallocation from another position	2 None			Discuss "What has changed?" For administrative positions, include comparisons with other departments or units having similar organizational structure, size or sensitivity.

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Modified Classification Review (MCR), Continued

Exempt positions

Filling an exempt position is handled under the same procedures whether it is a regular exempt position or converted position (to exempt) being refilled after the initial appointee has left. Refer to the Personnel Operations Manual (POM) section on Exempt Positions and Appointments for exempt appointment documentation process.

Retired annuitants

If the appointment of a retired annuitant is to a classification, which is designation MCR None or MCR II, a 625 is not required. See Personnel Action Manual, Section 2.57, for State Controller's exceptions.

T&D assignments

If the "To" class is designated MCR None or MCR II, follow the table above.
