



Facilities Clerical Benchmark Review: Questions & Answers

Does the clerical benchmark review apply to clerical workers in the community sector?

No. The clerical benchmark review was part of the 2006-2010 facilities subsector bargaining through a signed Letter of Intent found on “page 208” of the collective agreement.

I am a clerical worker and want to know if I will be upgraded through the clerical benchmark review?

The critical determination is the work you are currently performing and how the employer has classified your position. In order to make this determination, you will need to gather some information about your job:

- Get a copy of your current job description by contacting Human Resources, or if you have a Work Design Classification Department in Human Resources, then through them. The employer is required to give you a copy of your job description as per section (5) (4) of the *Maintenance Agreement*, found on page 109 of the collective agreement.
- The job description will indicate the benchmarks the employer has matched you to. Look at the benchmarks your position is matched to and see if you are matched to any of the following benchmarks:

Finance

- Clerk IV, Accounts Receivable (10205)
- Clerk IV, Accounts Payable (10206)
- Clerk V, Accounts Receivable (Patient Billing) (10209)
- Clerk V, Accounts Payable (10210)
- Clerk V, Accounting (10212)

Payroll

- Clerk IV, Payroll (10703)
- Payroll Supervisor I (10704)
- Payroll Supervisor II (10705)
- Payroll Supervisor III (10706)

Staffing

- Clerk, Housekeeping (10308)
- Clerk IV, Staffing (10310)
- Clerk V, Staffing (10312)
- Clerk VI, Staffing (10314)
- Staffing Coordinator (10316)

OR Booking

- Clerk IV, Admitting (O.R. Booking) (10004)
- Clerk V, Admitting (O.R. Booking) (10008)
- Clerk VI, Admitting (O.R. Booking) (10011)
- Supervisor (O.R. Booking) (10014)

New Benchmark

- Clerk IV (A) Admitting (Outpatient Booking) *previously duties were matched to benchmark 10002

** If you are matched to any of the above-noted benchmarks, your classification and wage rate may be adjusted.

How are changes to the benchmarks applied, and what will be the impact on the rate of pay?

If you are matched to any of the above-noted benchmarks, then you might be upgraded, depending on the work you are performing.

Finance: If you are matched to any of the **five** noted finance benchmarks, then you will move to the corresponding benchmark rate:

- Clerk IV, Accounts Receivable (10205) – you will move from grid 16 to grid 17
- Clerk IV, Accounts Payable (10206) – you will move from grid 16 to grid 17
- Clerk V, Accounts Receivable (Patient Billing) (10209) – you will move from grid 21 to grid 22
- Clerk V, Accounts Payable (10210) – you will move from grid 21 to grid 22
- Clerk V, Accounting (10212) – you will move from grid 21 to grid 22

Payroll: If you are matched to any of the **four** noted payroll benchmarks, then you will move to the corresponding benchmark rate:

- Clerk IV, Payroll (10703) – you will move from grid 16 to grid 17
- Payroll Supervisor I (10704) – you will move from grid 21 to grid 22
- Payroll Supervisor II (10705) – you will move from grid 24 to grid 25
- Payroll Supervisor III (10706) – you will move from grid 26 to grid 27

** **Note:** The finance and payroll benchmarks were revised to now include a course requirement in the qualifications, which resulted in a one grid increase for those benchmarks. Anyone who is presently matched to these benchmarks should receive a pay rate increase, even if they do not have the revised course requirement based on the equivalency language of the benchmark and the implementation language of the *Final Settlement and Implementation Agreement*, section 12.

Staffing: Any member matched to the Clerk Housekeeping benchmark 10308 (grid 14), will now be matched to one of the following higher-level benchmarks depending on the level of staffing responsibilities you are performing:

- (benchmark 10310 – grid 16)

- (benchmark 10312 – grid 21)
- (benchmark 10314 – grid 24)
- (benchmark 10316 – grid 28)

The Clerk Housekeeping benchmark (10308) will have the reference to “Calls in and allocates relief staff to fill temporary staffing requirements” removed from the responsibilities of the benchmark. This benchmark will continue to be utilized and will remain at the grid 14 rate of pay.

The reference to “nursing” in the previous staffing benchmarks will be removed, thereby opening up these benchmarks to any member performing staffing duties, who meets the level definition of the benchmark. This means that if you are performing staffing for a department other than Nursing, your position should be reclassified to one of the following benchmarks based on the level of staffing you are performing.

- Clerk IV, Staffing (10310) – Level Definition – **call in relief staff** according to pre-determined guidelines and perform clerical functions
- Clerk V, Staffing (10312) – Level Definition – **allocate** and call in relief staff and perform clerical functions
- Clerk VI, Staffing (10314) – Level Definition – **prepare & adjust staff rotations**, allocate & call in relief staff and perform clerical functions
- Staffing Coordinator (10316) – Level Definition – **are in charge of staffing & employee scheduling functions** including **preparation of master rotations and approval of staff rotations**

OR Booking: The OR Booking benchmarks now include “outpatient” and “daycare” in the level definition. Previously, the employer had not recognized members as being matched to the OR Booking benchmark series for preparing, maintaining and assigning patients/procedures to OR slates, when working in “outpatient” and “daycare” areas, and had matched members to benchmark 10002 (Admitting, Outpatient Booking) grid 16, or had classified the positions as Nursing Unit Assistants (grid rate SB 16). With the changes to the OR Booking series, now specifically referencing “outpatient” and “daycare” areas, members who are performing this work in some outpatient and daycare areas should be reclassified to one of the OR Booking benchmarks, depending on the work you are performing.

- Clerk IV Admitting (O.R. Booking, 10004) grid 16 – Level Definition defined – **assist** a senior position with **preparing & maintaining OR slates** by gathering information and making adjustments to OR slates **subject to the approval of a senior position such as a Senior OR Booking Clerk, Registered Nurse**
- Clerk V, Admitting (O.R. Booking) (10008) grid 21 – Level Definition – prepare, maintain and **assign** patients/procedures to **OR slates subject to review by nursing staff and/or physicians**
- Clerk VI, Admitting (O.R. Booking) (10011) grid 24 – Level Definition – **supervise one to ten designated OR Booking staff**
- Supervisor (O.R. Booking) (10014) grid 33 – Level Definition – **supervise more than ten designated OR Booking staff**

A new benchmark (Clerk IV(A), Admitting Outpatient Booking) has been created. Any members who determine outpatient appointment priority by reviewing and evaluating patient information such as the patient history, test results or pertinent reports should be matched to the new benchmark 10015 (*see Clarification language dated February 8, 2010*).

The employer has until April 1, 2010 to conduct an audit by reviewing members' jobs and determining which members are performing this responsibility. The final rate of the new benchmark will be determined once the employer has completed the costing and determines if additional funding is available. Those monies will be applied to the grid rate of this new benchmark. Previously, the employer had matched many members to benchmark Clerk IV, Admitting (Outpatient Booking, benchmark 10002) grid 16.

The new Clerk IV(A) benchmark identifies the responsibility to “determining priorities of outpatient appointments.” What is meant by this for the purposes of being matched to this benchmark?

This benchmark was created to recognize clerical members who were assigned the responsibility of **prioritizing patient appointments**. Although it is the physician who is sometimes ultimately responsible for determining the urgency level of the appointment, it is the outpatient booking clerk who decides which patient should be booked before the next one.

This decision is made by **reviewing and evaluating patient information**, such as **patient history** or **test results** or **pertinent reports** in order to **determine** the appointment **priority**. Although employer's guidelines and instructions will be available, the outpatient booking clerks must look at the patient information (as stated above), **make an evaluation** based on knowledge and ability to understand that information, and then using their own discretion decide where the appointment should be scheduled /booked.

This benchmark does not contemplate booking one patient before another that might follow a typical check of test results, or checking to ensure that all information required for booking is complete.

I work in Ambulatory Care as a Nursing Unit Assistant (SB 16) and am also matched to benchmark 10002. I have the responsibility for assigning patients to surgical daycare slates. What will happen to my benchmark match?

The current wage schedules are found on pages 267-268 of the collective agreement and on page 280 for Nursing Unit Assistants. The benchmarks for the facilities subsector classification system are posted on the HEU website at http://www.heu.org/facilities_benchmark/.

The Admitting Outpatient Booking benchmark 10002 is at grid 16, which is currently at \$19.86. The Nursing Unit Assistant benchmark 10317 is at grid SB 16, which is currently at \$20.46. The responsibility of assigning patients/procedures to surgical slates is captured by

benchmark 10008, which is at grid 21 (\$21.59). The employer will be reviewing jobs performing this work and should upgrade you from grid SB 16 to grid 21.

How do I make sure that the employer doesn't overlook me when they are reviewing the jobs?

You should contact the employer in writing to ensure they are aware, and as well copy your local site representative on your correspondence with the employer.

Who makes the determination of the benchmarks I am matched to?

The employer organizes the work, develops the job description that defines your work, and makes the determination of the benchmark match for each job. The union has the right to appeal the employer's decisions, if they are not consistent with the classification system defined in the *Maintenance Agreement* found in the collective agreement.

I work in a really small admitting department of a hospital. I am currently paid grid 16 and do everything like switchboard, as well as determine priorities for all outpatient appointments. Will I be upgraded in the clerical benchmark review?

In our classification system, quantity of work performed or size of the hospital are not indicators for compensation in our classification system. What's important are the principles that our classification system is based on – (page 117) of the *Maintenance Agreement* in the facilities collective agreement – which are the **type of duty** and **level of responsibilities/skills** and the **qualifications** required by the employer for the job.

The switchboard operator is matched to benchmark 10404 placed at grid 17. As you are currently at grid 16, you should have also been integrated with benchmark 10404 for the switchboard responsibilities, and you should be integrated with the new benchmark for determining priorities in the new Outpatient Booking benchmark 10015. The Outpatient Booking Clerk IV(A) will initially be placed at grid 17. However, if any additional money remains, that money will be applied to the new benchmark (10015) to increase the rate of the benchmark beyond grid 17, and thereby increase your rate of pay.

FINANCE & PAYROLL

I am a Clerk IV Food Services Clerk who does accounts payable/accounts receivable. Will I get upgraded from the clerical benchmark review?

You have to get a copy of your job description and see if you are matched to any of the benchmarks found above. So, if you are matched to any of the following benchmarks 10205, 10206, 10209, 10210, 10212, 10703, 10704, 10705 or 10706, then you should be moved from grid 16 to grid 17.

I am a Clerk VI in finance and when I reviewed the benchmarks being upgraded I note that the Clerk VIs did not get an increase. Can you tell me why?

The qualifications in the Clerk VI benchmarks already have a significant qualification requirement for “two years of the CMA or CGA program.” In order to maintain internal equities within the class series, it could have meant only a one grid increase (0.33 cents) for an increase in the already significant qualifications of the benchmark, which did not seem equitable. The finance benchmarks that were upgraded (benchmark 10205, 10206, 10209, 10210, 10212) previously had no course requirements in the qualifications of the benchmark.

In the arbitration settlement agreement dated July 27, 2009, the parties were bound by section 2, which stated: “The parties agree that any adjustments to wage rates must result from a change in benchmark content.” Therefore, because the Clerk VI benchmarks remained unchanged, they did not receive a wage grid increase.

I am a Clerk VI working in finance and have my own portfolio of financial responsibilities. I have been reviewing the benchmark changes and believe I should be matched to the Accounting Supervisor (benchmark 10216) and Accountant I (benchmark 10217) because I am responsible for performing the duties listed in the benchmark, as well have the 4th level of the CGA program. How do I go about getting matched to those benchmarks?

First, you need to go through your job description to:

- confirm the duties you are performing, and
- identify and describe duties that are missing from your job description.

Then, you need to look at the benchmark you are seeking to be matched to, and confirm which duties in the higher-level benchmark you are also performing. You will need to describe the responsibilities of those missing duties from the higher-level benchmark, as well as your level of authority for the duties performed.

Finally, you need to identify your duties on a daily, weekly, monthly and yearly basis by providing a written sample “day of duties performed”, referred to as a “Day in the Life”. You then collect all of this information, along with a copy of your current job description, and speak to a local site representative about filing a Job Review Request (JRR). The HEU servicing representative will be able to assist local site representatives with filing the JRR once all of the evidence has been provided, that supports the JRR appeal.

I worked as a Clerk IV (Accounts Receivable) until July 2008, at which time I retired after 20 years of service. Will I be getting any retroactivity?

If a member has retired, resigned or changed jobs between April 1, 2007 and March 31, 2010, and were performing the work or were matched to a benchmark identified above, then you should be entitled to retroactivity for hours worked in that classification. You should notify the Human Resources department of your facility in writing, and copy your site representative on the correspondence, advising them that you should be compensated for the additional increases on hours worked when you were matched to that benchmark.

OR BOOKING

I work in OR booking and assign in-patients to OR slates, and am currently paid grid 21. Will I be getting an increase?

No, you will not. The changes to the benchmark are meant to capture members who were assigning daycare and ambulatory patients to OR slates, but the employer in some cases was only paying them at grid 16 and sometimes at SB 16, which was not consistent, and this created inequities among members performing the same work. Those members will now be upgraded to grid 21 consistent with how you are presently classified.

What is the difference between the Clerk IV and Clerk V in OR Booking?

The Clerk IV is an “assist role” who **does not assign** the OR slate. The Clerk IV can make adjustments to the OR slate, which then must be approved by a senior position like a senior booking clerk or nurse, whereas the Clerk V assigns patients/procedures to the OR slates subject to review by nursing staff and/or physicians.

If positions are being upgraded will they have to be posted?

No. Existing benchmarks will be changed, and any employees matched to those benchmarks will then go with those changes, and the positions should not be reposted.

Do I have to file a Job Review Request (JRR) to be upgraded to the new benchmark?

No the employer will be making their determinations and advising the members and the Union of those determinations

I work as a clerk and am matched to benchmark 10308 and I do a lot of timekeeping duties. Will I be upgraded?

Benchmark 10308 only had the reference removed to “staffing”. That benchmark continues to be in effect, and remains matched to grid 14. Members who are matched to benchmark 10308 will continue to remain at grid 14 for those timekeeping duties. If a member was matched to that benchmark for staffing responsibilities, they will now be matched to one of the staffing benchmarks (10310, 10312, 10314 or 10316) depending on the level of responsibility, and upgraded to the benchmark match rate of pay.

Why were the Nursing Staffing benchmarks changed?

With the shift to centralized staffing, inequities existed between members performing staffing duties for nursing, and those performing the same staffing functions for other areas like pharmacy, lab and maintenance. The changes to the benchmarks were meant to open up the nursing benchmarks so that the responsibilities for the work performed were compensated consistently between departments and work areas.

I work as a Nursing Unit Assistant (NUA), SB 16. Will I be getting an increase?

NUAs work in many areas of the health care system and there's a lot of history on how the benchmark was developed. The NUA benchmark was implemented on November 21, 2005. The union took the position that the rate of pay for the NUA was not yet finalized. In the 2006-2010 round of bargaining, special adjustments for the NUA were negotiated, above the previous grid 16 rate which is now referred to as SB 16 (about halfway between grid 17 and grid 18). The dispute on the final rate of pay for the NUA benchmark was referred to arbitration.

Meanwhile, the clerical benchmark joint committee met from July 2006 to July 2007 to review all 85 benchmarks in the clerical job family. The union also conducted a survey of all HEU clerical members, including NUAs, to seek input on the benchmark changes to be made. Most of the input from NUAs was that their rate of pay was too low for the responsibilities of their job. As the NUA benchmark was only six months old, no significant changes to the benchmark were identified. The housekeeping changes to the clerical job family benchmarks were completed in July 2007.

In May 2007, the employer advised the union that benefit costs also needed to come out of the (\$3-million) Clerical Benchmark Review Fund, thereby reducing the fund by 25 to 30 per cent. The union was not in agreement that benefit costs should be taken out of the fund. However, an arbitrator determined in July 2009 that benefit costs would come out of the fund at 21 per cent. Additionally, the arbitrator decided that any allocation of money to benchmarks had to result from a change in benchmark content. So, without the change in benchmark content to the NUA benchmark, there would be no direct allocation of money.

The arbitration on the final rate of pay for NUA was held on April 11, 2008 with a decision delivered on May 12, 2008 that the rate of pay for NUAs was to be at grid SB 16. Increases in the rates of pay are dependent on the actual work performed by a NUA.

For example: if you are a NUA working in Ambulatory Care paid at grid SB 16 and are **assigning patients to ambulatory slates** that benchmark is now paid at grid 21 (benchmark 10008), so you would be moved from grid SB 16 to grid 21, if you are assigning patients or procedures to OR slates.

However, if you are a NUA working in medical imaging and are **determining patient appointment priority** by reviewing the patient history, the new rate of pay for that benchmark will, in the interim, be set at a minimum of grid 17. So, being at a grid SB 16, you wouldn't get an increase because an SB 16 is paid more than a grid 17, unless there's any money left over and the rate of pay for the new Outpatient Booking Clerk IV(A) goes up, and is higher than an SB 16. The critical determination is what the work is that you're doing.

The current wage schedule for NUAs is found on page 280 of the collective agreement, under Wage Schedule B (in the middle of the page). The regular wage schedule is found on pages 267-268. Please note that the wage schedules are separated for each year; for instance 2006, 2007, 2008 and 2009.

As a NUA, I have more education than some of the other benchmarks. How do I go about filing a Job Review Request (JRR)?

In order to file a JRR, you have to indicate how your position has changed, and why you think the job description your position has been assigned to is inappropriate. In other words, you can't file a JRR because you are not in agreement with the rate of pay for your benchmark.

Members must identify other higher-level duties in other benchmarks or qualifications required by the employer that are not captured by the existing benchmarks in order to file such an appeal.

Updated March 18, 2010