

Attachment 4 – How to Classify Duties

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PURPOSE STATEMENT

The **How to Classify Duties** document is designed to assist in assessing the classification of duties and in their subsequent evaluation for approval.

This advice can be applied to the classification of new jobs or for the reclassification of existing duties, which processes could be initiated either by management or by an incumbent employee. The people likely to utilise this advice would be line managers and/or employees or HR staff preparing draft classification assessments, HR staff and others evaluating such assessments, and decision maker/delegates wishing to verify aspects of the process prior to making a decision.

It follows that where applicable, account of the proper application of this document may be taken in any review of such a classification decision.

USER GROUPS

- Any employee or ordinary line manager who undertakes a reclassification application, or those classifying new duties.
- HR operatives in general, who have a duty of care to assist the above, as well as those who (separately) have a responsibility to assess such applications and make recommendations.
- A (non-HR) delegated decision maker required to competently execute this administrative decision.
- Internal and possibly external reviewers charged (under sections 61 or 62 of the PS Act) with making findings as to fair process and the merits of those decisions.

CLASSIFICATION RULES AND REQUIREMENTS

It is essential that **How to Classify Duties** is used in conjunction with Determination 5, Attachment 3: **Classification Rules and Requirements**; that is, read in full before embarking on the assessment process.

MAKING JUDGEMENTS

All classification systems, whether summarised as point scores (Mercer) or not (Classification Standards), require the assessor(s) to make judgements. Accordingly, assessors need to be at a sufficient classification level (in terms of level of responsibility), experienced and if necessary, professionally qualified to undertake this responsibility, whether individually or as a group.

Application of judgment on a duty-by-duty basis, as set out in the appropriate Classification Assessment template, means the assessor's focus can remain evidence based, tight and discrete. Aggregation of those results is thus essentially empirical not subjective. The summarised preliminary classification assessment then becomes inherently more transparent, both for the decision maker and in the event of a reclassification that is not approved, for the applicant and, if necessary, a subsequent reviewer.

Fundamental classification principles

Fundamental to the application of the Classification Standards is the principle that classification is the result of an assessment of the overall responsibilities and value of the contribution to the employing agency. That is, classification is not necessarily based on the highest responsibility most frequently exercised.

There may be some variation in the assessed level of individual duties. A particular statement of a duty may be assessed at a lower classification level; this may not necessarily invalidate an assessment of “overall responsibilities and value of the contribution”. Equally a particular duty statement assessed at a higher level does not necessarily warrant a higher classification for the whole of a job; e.g. frequency and proportion of time spent are relevant factors.

The objective is to arrive at a reasonable, well rounded classification judgement about the overall responsibilities and value of the corporate contribution of the duties, that one person can reasonably be expected to carry out.

OCCUPATIONAL COVERAGE

How to Classify Duties is to be applied to classification processes for the following occupational streams:

- Administrative Services
- Allied Health Professionals
- Operational Services
- Professional Officers
- Technical Grades Officers

ADMINISTRATIVE STREAM DUTIES

Administrative services stream work level definitions

Not all Work Level Definitions will necessarily apply to one particular set of duties. In assessing the work value of particular duties, it is important to identify whether the wording of the particular definition includes ‘and’, ‘or’, ‘may’, ‘may not’ and whether statements in a sentence are in fact disjunctive; depending upon which, some elements may be mandated for the classification level and some may not, and may not necessarily be applicable to the particular duty or duties.

Administrative services stream work level characteristics

Care needs to be taken in the use and interpretation of the Work Level Characteristics. Firstly, the work level “fields” (Knowledge and Experience, Responsibility and (work) Environment) are the critical factors in support of the Work Level Definitions. These “dot point” characteristics describe typical factors or attributes apparent in jobs at each level, however, not all characteristics apply to all jobs at each level.

Within a category (e.g. working environment), no one characteristic is mandatory, and none is weighted or necessarily determinative. Notwithstanding, ASO3 is the first level for line supervision and that of ASO4 for working under limited direction. Equally, there may be a feature or duty which does not readily equate to any exemplified characteristic; this would need to be assessed for its intrinsic work value level against the standards as set out in the work level definitions.

Administrative services stream occupational groupings

To assist in the classification process, administrative work is divided into five Occupational Groups (previously “Career Groups”). Their purpose is to complement, but not override, the Stream Work Level Definitions and Characteristics which are the standards the classification is based on.

These describe typical duties, provide examples of the types of tasks and/or functions and the standards at which they are to be performed at each classification level. A set of duties may incorporate duties from more than one Occupational Group.

Reference to Occupational Groupings may help in the initial appraisal of the work levels of duties for subsequent assessment against Work Level Definitions and/or Characteristics, but the Occupational Grouping statements are not the determinative standards. Care needs to be exercised in how they are interpreted and any weighting placed upon them. This is illustrated by the following example:

Work Level 4 (ASO 4)

Group 5: Consultancy and Information

Interpretation

Employees at this level work under limited direction and are responsible for the outcomes from a range of functions within an agency including the co-ordination and control of related activities and the standard of work quality/service delivery, or provide relevant skills and experience in a specialist area of operation. Employees contribute to, or participate in, forward planning and policy development and/or implementation on behalf of their work units or their agency.

Work at this level requires a sound knowledge of agency programs, policies, activities, structures, service functions and/or a range of disciplines, or technical expertise and competence normally based on prior discipline related experience. Employees may exercise responsibility for a unit of agency activity and undertake projects of limited scope with impact on agency operations.

This level requires the use of initiative and judgement where procedures are not clearly defined, the identification of specific or desired performance outcomes, autonomy of operation within broadly defined guidelines.

“Employees at this level ... are (either) responsible for the outcomes from a range of functions within an agency including the coordination and control of related activities and the standard of work quality/service delivery, or (else) provide relevant skills and experience in a specialist area of operation.” *The statements in this sentence are to be correctly read as disjunctive and alternative statements, but only one is mandatory. That is, to qualify as ASO4 Level, the duties (of one employee) may be either effectively generalist/supervisory (first statement) or specialist (second statement), but could not necessarily be expected or reasonably required to be both, full time.*

Similarly with “Employees contribute to, or participate in, (either) forward planning and policy development and/or (else) implementation on behalf of their work units or their agency.” *Again, disjunctive and alternative, and whilst the full statement allows that one set of duties may in fact fulfil elements of both, only fulfilling one function is mandatory for classification.*

And “Work at this level requires (either) a sound knowledge of agency programs, policies, activities, structures, service functions and/or a range of disciplines, or (else) technical expertise and competence normally based on prior discipline related experience.” *That is, disjunctive statements and alternative fields of expertise where only one is mandatory and again, the latter statement is applicable to a specialist role.*

Finally “Employees may (or may not) exercise responsibility for a unit of agency activity and (may or may not) undertake projects of limited scope with impact on agency operations.” *The full sentence is clearly illustrative in its intent and cannot be construed as mandatory for either statement element, for the duties to (still) qualify for ASO4 Level.*

PROFESSIONAL OFFICER, ALLIED HEALTH PROFESSIONAL AND TECHNICAL GRADES DUTIES

Whether for a reclassification or classification of new work, the public sector agency has a (public interest) duty of care to ensure that the necessary relevant discipline specific expertise is brought to bear, *from the very outset*, in the classification process. See **Classification Rules and Requirements: Assessment of professional and technical expertise** (refer to Attachment 3 Determination 5)

Allied Health Professional work level definitions

Where the AHP Work Level Definitions specify prerequisite qualifications and/or experience and/or functions carried out (e.g. AHP2, AHP5, AHP6) these must be specified as being fulfilled. Allied Health Professional Work Level Definitions at AHP3 and above prescribe certain mandatory standards which must be met. Any classification assessment needs to comply with these. The AHP Classification Assessment Template is set out accordingly.

Use of external contractors

Under the *Public Sector (Honesty and Accountability) Act 1995*, external contractors retained to undertake classification assessments must always act honestly in the performance of that work.

The Classification Standards of Determination 5 are binding on the public sector agency entering into a contract. It follows that these contractual requirements legitimately include a contractor complying with the Classification Standards **Classification Rules and Requirements** and **How to Classify Duties** and the presentation of the findings in the format required by the agency, i.e. the appropriate **Classification Assessment Template**.

This willingness to comply needs to be agreed prior to the signing of a contract and compliance made a condition of its fulfilment.

Classification assessment template

The Classification Assessment Templates for the particular occupational stream are to be found in Attachment 3 **Classification Rules and Requirements**. The Classification Assessment Template should be the primary evidence base for the making of a classification decision and needs to be carefully and fully completed and retained as an accountable record.

Classification steps

1. Read **Classification Rules and Requirements** in full before embarking on the assessment process. This especially relates to the issue of bias, or potential for a reasonable perception of bias.
2. Read the Definitions and Work Level Definitions/Characteristics for the likely or proposed classification level of the duties.
3. Read the Work Level Definitions/Characteristics for the levels above and below the likely or proposed classification level, having regard to the requirement to test against more than one classification level.
4. Utilise **Classification Rules and Requirements: Factors to be identified and taken into account** and **Information to be gathered** to arrive at evidence-based statements of the nature of the actual duties, as they are being carried out (or substantive statements of agency intent, where they are yet to be carried out). Where Occupational Groupings are available, it may be useful to reference these to get another insight into occupational relativities.
5. Refer to **Classification Rules and Requirements: Classification process**.
6. Complete the appropriate Classification Assessment Template for **Administrative Services, Professional Officers, Allied Health Professionals** or **Technical Grades**.
7. Provide the completed template and recommendation for decision to the decision maker.
8. If this is a reclassification application by an employee (under section 46(3) of the PS Act), the employee can advise the decision maker of the relevant recommendation contained in the **Classification Rules and Requirements: Fair Process Checklist for Reclassification Applications**; that is, for the applicant be provided with the reasons for proposed decision (i.e. the completed template and recommendation) for consideration, prior to decision.
9. It is recommended that the decision maker provide the completed template in the formal notice of a reclassification decision.
10. All interview notes, information sources, relevant documentation and emails etc are accountable records to be retained.