



Classification & Exam Guidance



Idaho Division of
Human Resources

Executive Office of the Governor

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Intent

The intent of this document is to provide the state philosophy and guidance to human resource staff on classification format and content, minimum and specialty qualifications and how those translate to exam questions and establish direction regarding knowledge progression. This is not an all-inclusive document and other resources such as the IDHR website and job posting platform may be utilized. For additional questions or guidance, please consult with your supervisor. This document will be updated with Luma and HR Modernization implementation.

Definitions

The following definitions apply to this document:

- **Auto-Score Questions:** questions with multiple answers, yes/no, or skills-based/aptitude questions automatically scored by the system.
- **Career Ladder:** a series of progressively higher positions typically within a job family.
- **Classification Specification:** is a generalized description of the qualifications and key responsibilities of one or more positions that comprise a class.
- **Desired Qualification:** Questions that relate to preferred knowledge or experience for the job that are not minimum requirements but would increase an applicant's exam score if they possess them.
- **Job Family:** a group of jobs that include similar responsibilities and require similar knowledge, experience, training and skills.
- **Knowledge:** indicates a body of facts and information which must be acquired through some sort of learning experience (e.g., formal education, training, paid work experience, volunteer work experience, etc.).
- **Merit Examinations:** examinations designed to evaluate factors relevant to an individual's ability to perform the duties of the classification competently. The factors tested are strictly job-related and may include, but are not limited to, education and experience, knowledge, skills, abilities, aptitude, and physical ability.
- **Minimum Qualifications (MQs):** the minimum levels of knowledge, experience, skills, abilities, licensures, certifications, and other job-related requirements that must be met for a candidate to be considered for any position within the classification.
- **Minimum Qualification Specialty:** additional MQ that must be met for a candidate to be considered for a position, specific to an agency or program, within the classification.
- **Skills and Abilities:** indicate a manual capability which is usually acquired through some form of instruction, training, or practice. Examples include manual trades, equipment operation and the arts.
- **Subject Matter Expert (SME):** an individual with expert knowledge about what it takes to do a particular job.
- **Text Response Questions:** Open-ended questions that require narrative responses and a SME review for scoring.
- **Typical Statement:** "Helping Statement" that assists both the applicant and SME in identifying the level of education/experience needed to meet minimum qualifications. The term typically is used because there could be other ways to meet the criteria not specifically included in the statement.
- **Working Title:** A title used which may more specifically reflect the job duties of the position or its location within an organization.

Classifications

Philosophy

The classification system is the backbone of the merit system, and its intent is to provide equal pay for equal work, identification of actual work performed, fair employment and equal opportunity for promotions, and equitable compensation. To uphold the merit system, we must appropriately classify employees and determine the minimum qualifications required to perform a job. Idaho Code 67-5309(c) requires that all positions which are common to the departments concerned shall have the same classification titles, minimum requirements, and compensation ranges. This feature of the state personnel system requires a centralized approach to manage the state classification system.

Overview

It is the responsibility of the Idaho Division of Human Resources (DHR) to develop and maintain general classification and examinations. IDAPA 15.04.01.092.02 requires DHR to determine the contents of each examination based on appropriate professional techniques and procedures of job analysis and test development. The following information regarding classification specification structure, minimum qualifications, specialty requirements, exam creation, knowledge progression, etc. are resources to provide guidance to those working with the classification system and assist in establishing consistency statewide.

Please note that all information indicated in blue are the fields where the information will be located in used in Luma.

Guidance

A classification specification (class spec) usually includes the following kinds of information: (1) class title, (2) nature of work or function, (3) examples of work performed, (4) knowledges, skills and abilities and (5) necessary special requirements, (6) distinguishing characteristics and (7) supplemental information.

An example is included below for each section for your reference.

Class Title ([Description](#))

The class title is the official title to be used for payroll, position control and other personnel and budget records. It may cover positions in several agencies and does not prevent the use of more specific working titles, if individual agencies so desire.

Example: Administrative Assistant 2

Class Purpose/Description ([Summary](#))

This section describes the general type of work and responsibilities characteristic of each class.

Example: To perform complex secretarial, office administration, and public relations assignments; perform related work.

Nature and Scope/Example of Duties ([Responsibilities](#))

To illustrate a more specific picture of key responsibilities assigned to positions in the class in terms of typical examples. The intent of this section is not to be an exhaustive list as other duties appropriate for the classification may be assigned.

Example: These positions perform high level secretarial duties. Incumbents have a major role in coordinating administrative activities which requires frequent contact with executives, the public, other agencies and government officials. This requires the incumbent to utilize effective public relations and liaison skills. Incumbents may attend meetings for the administrator to relay and collect information. Incumbents function with considerable independence and exercise discretion in applying policies and procedures. The work requires extensive knowledge of department programs and objectives. They are responsible for the research, compilation, and organization of materials for administrators' use in problem resolution. These positions are often responsible for ensuring that assignments given to other staff by the administrator are completed and timelines are met. Incumbents may supervise staff. These positions independently research, analyze, and compile information to prepare reports, handle complaints, or resolve problems; compose correspondence for supervisor on own initiative or from general instructions; format/type a variety of executive, sensitive, confidential, official and/or legal letters and documents.

Minimum Qualifications (MQs) & Specialties ([Detailed Responsibilities](#))

Knowledge, experience, skills and abilities set the requirements of employees for successful work performance in positions for the classification. They are written primarily in terms of what is needed/required of new employees at the time of appointment and may include other requirements which are usually achieved within a specific timeframe on the job (i.e. POST Certification). They can be included as either a minimum qualification or specialty requirement. They are not the desirable qualifications of a thoroughly experienced employee in the class. Primarily, their purpose is to be of assistance in the recruitment, examination, and placement of applicants. Personal characteristics or soft skills, such as honesty, courtesy, dependability, and professionalism are not mentioned. These may be addressed in other areas of the hiring process, i.e. the job announcement or interview.

Please note that all minimum qualifications are required for all incumbents of the classification.

Knowledge is information that an employee should know at the time of appointment or entry on the job. On some class specifications, the amount of knowledge required is indicated through the use of phrases that have the following general meanings: [note: These designators are not universal but are illustrative.]

- Some knowledge - implies familiarity only with the elementary principles and terminology.
- Good knowledge - implies sufficient knowledge of the subject to enable the employee to work effectively within a normal range of standard work situations with only general supervision. Ordinarily a college graduate in a particular field should have a general knowledge of the subject matter of that field. An individual seeking employment in a trade should have a working knowledge of the methods, tools, techniques and practices of that trade.
- Considerable knowledge - implies an advanced knowledge and comprehensive understanding of the subject matter that will permit not only the solution of unusual work problems, but also advising on technical questions and planning methods for difficult work situations.
- Comprehensive knowledge means education and experience which enables one to be thoroughly acquainted with all phases of the subject area and be considered an expert in the field.

Example: Good knowledge of: office support functions including word processing, filing, composing a variety of business documents and reception; researching, compiling, and summarizing data for reports.

Experience may also be another required area. Experience means demonstrated performance of the duties and/or responsibilities of the function/task/skill listed. Background required to satisfy an experience requirement will be determined by the competency level needed for each class.

Example: Experience: interpreting, applying and explaining complex information such as regulations, policies or services; independently solving problems/performing liaison activities in a work setting; coordinating activities requiring complex arrangements.

Skills and abilities may follow the knowledge and experience requirements. These are indications of what an employee must be able to do on the job. They indicate a manual capability which is usually acquired through some form of instruction, training, or practice. Examples include: typing, fluency in language or form of communication

Example: Ability to: Type at the rate of 50 words per minute

In most instances, a certain amount of knowledge and experience gained in prior positions within a career ladder should allow a candidate to meet the minimum qualifications for the next position.

Areas such as critical thinking, should be assessed in the interview process and do not belong on the classification specification.

Credentials (Credentials):

In this section are listed specific licenses or certificates needed by an employee to perform a given job. Such licenses are those required by law for persons engaged in certain occupations such as law, medicine, nursing or the operation of equipment.

Distinguishing Characteristics

This section is typically used for those classifications in a job family or series. It includes where the position is located and how this position differs from the others within the job family or series.

Example: This classification is distinguished from the Administrative Assistant 1 by the requirement for heavy public relations role with department directors, division administrators, or comparable level executives outside the department. At this level the Administrative Assistant 2 is expected to handle highly sensitive, confidential, and/or political issues. They are also responsible for the coordination of administrative office functions, committees, and special projects.

Supplemental Information

This section may be used to identify other relevant information regarding the classification such as required travel, working environment, or physical requirements.

Additional Information

The information included in the class spec for a position should be the closest match for key responsibilities but does not need to be a 100% match. If the information reflected is at least an 80% match and the qualifications needed can be addressed with the minimum qualifications and specialties, then it is sufficient.

Exams

Purpose

The purpose of this guidance is to clarify and provide additional information related to merit examinations as referenced in Idaho Code Title 67, Chapter 53, and the Rules of the Division of Human Resources (DHR) and Idaho Personnel Commission (IPC).

Application

These guidelines apply to all individuals involved in the process of conducting merit examinations, including but not limited to, appointing authorities, agency human resource (HR) staff, subject-matter experts (SMEs), incumbents, or other qualified persons in the preparation of examinations.

Guidelines

Minimum Qualifications

- Minimum Qualifications (MQs) and MQ specialties (agency/program specific) are determined by assessing the minimum amount of education, work experience, training, skills, abilities, aptitude, and physical ability required to perform the duties of the classification competently.
- Every MQ listed on a class specification must have an associated question on the application exam.
- When education is used as a qualifier, individual courses and/or entire degree programs may be considered.
- Applicants will be disqualified from the hiring process if one MQ is not met.
- Typically gained by statements are usually the established 70 level grading criteria.

MQ Specialties

- Specialties can be found in some, but not all classifications.
- Specialties must be identified in the class specification [/job](#).
- Applicants will be disqualified from the hiring process if an MQ specialty included in the exam is not met.

Desired Qualification

- May be experience or knowledge that is helpful for an applicant to have, but not required upon hire. Applicants cannot be disqualified from the exam process for failure to meet an extra credit/desirable qualification; however, it may increase their score.
- Certain things, like effective critical thinking, should be assessed in the interview process, and not in the application process (generally), as they are hard to establish criteria for.

Grading Criteria

The information on grading criteria below is intended to be for general reference and to recognize that knowledge and experience needs vary when developing exam criteria.

- The parameters for some, good, considerable and comprehensive knowledge found in this guidance should be used as reference for exam questions. Emphasis is given to granting applicants the maximum number of ways, within reason, to satisfy MQs. Applicants may be able to qualify through any combination of education, training, or experience such as academic courses, vocational training, work experience, certifications, volunteer experience, military experience.
 - **Some knowledge of:** is a basic understanding of a subject area gained through training, education or experience. More than reading about it or observing. Indicates a familiarity with basic or elementary principles and terminology and with some of the more

important sources of information, principles, tools, materials, equipment, or processes used.

Typically means a class, college course, or certain level of experience on the job. It is the amount of knowledge one might expect of an apprentice or beginner in a particular field of work.

✓ **How to meet minimum qualifications:**

- College coursework
 - 2-4 courses
 - related to subject area
 - note: company trainings or seminars may be comparable

OR

- Work experience
 - Minimum of 6 months (up to 2 years)
 - entry-level in nature
 - somewhat related to subject area

OR

- A combination of coursework and experience that represents the knowledge level above.

- **Good knowledge of:** is a well-trained person in a specific field of work who is either doing the job now or has done it in the past. Considered at the journeyman level.

Indicates the knowledge expected of a person, with a general understanding of the subject area, who can complete an assignment in a normal range of standard work situations.

✓ **How to meet minimum qualifications:**

- Bachelor's degree or higher in subject area or closely related field

OR

- College coursework
 - 2-4 courses
 - upper division
 - related to subject area
 - note: trainings or seminars may be comparable

AND

- Work experience
 - 2-4 years
 - mid-level in nature
 - closely related to subject area

OR

- Experience or a combination of coursework and experience that represents the knowledge level above.

- **Considerable knowledge of:** is a person who can perform all but a limited number of job tasks immediately.

Indicates the need for broad and subject matter knowledge in the occupational field concerned and the capacity to do most phases of it.

✓ **How to meet minimum qualifications:**

- Masters (or higher) degree in subject area or closely related field

OR

- Bachelor's degree in subject area or closely related field **AND** 1 year relevant experience

OR

- Work experience
 - 4 - 5 years
 - high-level in nature
 - directly related to subject area

OR

- Experience or a combination of coursework and experience that represents the knowledge level above.

- **Comprehensive knowledge of:** is a person considered an expert in the field and is thoroughly acquainted with all phases of it.

✓ **How to meet minimum qualifications:**

- Doctorate degree in subject area or closely related field

OR

- Master's degree in subject area or closely related field **AND** 2 years relevant experience

OR

- Work experience
 - 6+ years
 - high-level in nature
 - directly related to highly specialized field

OR

- Experience or a combination of coursework and experience that represents the knowledge level above.

- Formal training given by vocational schools, employers or other organizations may not be divided into courses. Therefore, 80-100 hours of training may be taken as a rough equivalent to one course.
- Generally paid and unpaid work experience should be considered similar or equivalent experience.
- When criteria requires a timeframe of experience i.e. one year work experience, the intent should be considered full-time (40 hours per week) unless specified otherwise. If someone worked part-time (20 hours per week) then 2 years would be the proper equivalent.
- Successful completion of Certified Public Manager (CPM) Program may meet the qualifications in areas such as management or program management.
- No one formula is truly adequate to equate education and experience. The complexity and level of the necessary knowledge, skills or abilities should provide the major basis for establishing equivalencies.
- Generally, minimum qualification criteria should be consistent for all exams within the same classification.
- Consider the following questions when building the criteria for the examination:
 - a. Is the degree and coursework still relevant? If not, what degree types or courses should be added? Are there any courses which should be deleted?
 - b. Is the professional accrediting body for the occupation, correct?

- c. Are the certification/licensure requirements for the occupation still relevant?
 - d. Is the level of education and/or experience required still appropriate? If not, what has changed and why?
 - e. Are there any other missing requirements or information? If so, what is missing? And how is it directly related to the key responsibilities of the job?
- Auto score questions are multiple choice or Yes/No questions graded by the system based on the scoring information assigned. Agencies should begin the process of shifting to this question format for all questions. This shift is a result of the movement to a new system that does not allow for subject matter expert scoring, will allow for more consistency with exams scores and shorten the duration to create the referral list.
 - a. When using auto-scored questions the information that the applicant must possess one of the levels of knowledge identified in the exam criteria should be included.
- Exams not scored by the system require assignment to a subject matter expert.
 - First-level supervisors are normally good SMEs. Superior incumbents in the same or very similar positions and other individuals can also be used as SMEs if they have current and thorough knowledge of the job's requirements.
 - SMEs are ineligible if a conflict of interest exists, including but not limited to being the hiring supervisor, participating in hiring and selection process, or being related to the applicant, etc.
- Scoring levels include:
 - a. 0 or 100: Yes or No answers, one level of grading criteria; can be used for MQs and extra credit. These would be the minimally required level of experience or knowledge and may not be needed to distinguish the top candidate.
 - Examples: Do you have experience in the following: researching and compiling financial information and preparing summaries and reports? Do you have at least six months of work-related experience using Microsoft Excel?
 - b. 0/70/85/100: Tiered answers that give applicants more points for more experience/education. Please structure the options from least to greatest experience/education options for point value.
 - 0 = applicant does not meet minimally required level of experience or knowledge
 - 70 = applicant meets minimally required level of experience or knowledge
 - 85 = applicant meets minimum requirements and has additional years of experience or higher level of knowledge
 - 100 = applicant has higher level of knowledge or experience and could be considered an ideal candidate
 - Not all levels must be included for questions i.e. 0/100

Key relevant documents

- Idaho Code 67-5302. Definitions.
- Idaho Code 67-5309. Rules of the Division of Human Resources and the Personnel Commission.
- IDAPA 15.04.01 – Rules of The Division of Human Resources and Idaho Personnel Commission.

Management

Some knowledge of management

Please select the option that best describes how you have gained some knowledge of management practices to include EACH of the following essential elements:

- Planning: determining organizational objectives and deciding how best to achieve them
- Organizing: determining how to use resources, defining responsibilities and authority
- Leading: influencing and motivating staff, delegating work and resolving conflict
- Controlling: establishing standards and evaluating performance, taking corrective action and measuring results

Completion of two upper division college-level courses that included all the essential elements of management (Planning, Organizing, Leading, and Controlling);

OR approximately 40 hours of management training or equivalent that included all the essential elements of management;

OR six months of experience performing all management elements described above.

Good knowledge of management

Please select the option that best describes how you have gained good knowledge of management practices to include EACH of the following essential elements:

- Planning: determining organizational objectives and deciding how best to achieve them
- Organizing: determining how to use resources, defining responsibilities and authority
- Leading: influencing and motivating staff, delegating work and resolving conflict
- Controlling: establishing standards and evaluating performance, taking corrective action and measuring results

Completion of a bachelor's degree in business management, public administration or related field;

OR completion of two upper division college-level courses that included all the essential elements of management (Planning, Organizing, Leading, and Controlling) AND 2 years work experience with responsibility for all four areas of management;

OR completion of Certified Public Manager Program (CPM);

OR 3 years work experience with responsibility for all four areas of management

Considerable knowledge of management

Please select the option that best describes how you have gained considerable knowledge of management practices to include EACH of the following essential elements:

- Planning: determining organizational objectives and deciding how best to achieve them
- Organizing: determining how to use resources, defining responsibilities and authority
- Leading: influencing and motivating staff, delegating work and resolving conflict
- Controlling: establishing standards and evaluating performance, taking corrective action and measuring results

Completion of a master's degree or higher in business management, public administration or related field;

OR completion of a bachelor's degree in business management, public administration or related field AND 1 year work experience with responsibility for all four areas of management;

OR completion of Certified Public Manager Program (CPM) AND 1 year work experience with responsibility for all four areas of management;

OR at least 4 years work experience with responsibility for all four areas of management