

**University of Central Florida  
Human Resources  
Position Exemption Worksheet - Confidential Employee**

**Please complete this form for your employees, print it using the 'Print' in the upper right, sign and return to the Director of Operations, Human Resources**

**"Confidential employees"** are persons who act in a confidential capacity to assist or aid **managerial employees**. **Managerial employees are persons** who perform jobs that are not of a routine, clerical, or ministerial nature and require the exercise of independent judgment in the performance of such jobs and as to whom one or more of the following applies:

1. They formulate or assist in formulating policies which are applicable to bargaining unit employees
2. They may reasonably be required on behalf of the employer to assist in the preparation for the conduct of collective bargaining negotiations
3. They have a role in the administration of agreements resulting from collective bargaining negotiations
4. They have a significant role in personnel administration
5. They have a significant role in employee relations
6. They have a significant role in the preparation or administration of budgets for any public agency or institution or subdivision thereof.

**Employee Name:**

**Does this employee report to a Managerial Employee (please refer to information regarding Managerial Employees on the second page)?**

**If yes - proceed with questions below; if no, then employee is not considered a Confidential Employee.**

**1. Does this employee regularly have access to confidential information concerning anticipated changes resulting from collective bargaining negotiations, such as by handling e-mail or filing for the Managerial Employee?**

Yes     No

***If yes, please explain.***

Enter text here:

**2. Does this employee assist a Managerial Employee in formulating policies which are applicable to bargaining unit employees by providing services such as note taking, collection of information, etc.?**

Yes     No

***If yes, please explain.***

Enter text here:

3. Is this employee reasonably required on behalf of the employer to assist the Managerial Employee in the preparation for the conduct of collective bargaining negotiations, such as by preparing, reviewing, or filing drafts, preparing, reviewing or filing budget issues relating to the conduct of negotiations, etc.?

Yes  No

*If yes, please explain.*

Enter text here:

In determining whether an individual is a Confidential Employee, it is necessary to consider whether he or she assists a Managerial Employee. **Managerial Employees** are those employees who:

1. Perform jobs that are not of a routine, clerical, or ministerial nature and require the exercise of independent judgment in the performance of such jobs;

**And**

2. Do one or more of the following:
  - a) Formulate or assist in formulating policies which are applicable to bargaining unit employees.
  - b) May reasonably be required on behalf of the employer to assist in the preparation for the conduct of collective bargaining negotiations.
  - c) Have a role in the administration of agreements resulting from collective bargaining negotiations.
  - d) Have a significant role in personnel administration.
  - e) Have a significant role in employee relations.
  - f) Have a significant role in the preparation or administration of budgets for any public agency or institution or subdivision thereof.

**If any one of these statements applies to the proposed Managerial Employee, please explain.**

Enter text here:

**If none of these statements apply, then he or she is not a Managerial Employee.**

Immediate Supervisor:

\_\_\_\_\_  
Signature of Immediate Supervisor      Date

Dean or Director:

\_\_\_\_\_  
Signature of Dean or Director      Date