

Instructions for Completion of Position Description Form (PD-102R-92)

In State Government, it is the responsibility of managers, administrators and supervisors to structure the organization, design positions and assign work to deliver program services in the most effective way. A vital part of this process is the preparation and use of position descriptions.

The attached Position Description Form is used by your department, your personnel office and the Office of State Personnel to obtain complete and factual information concerning the work assigned to positions. The form and these instructions have been designed with a format to (1) enable and aid managers and supervisors in describing their subordinate positions, (2) provide relevant and adequate information for the position classification process, and (3) provide management with a tool which is invaluable in other management functions, including recruitment and selection, orientation, work planning, training and others.

General Instructions: First, please read the instructions completely and examine the blank form. Second, complete the identification information requested in Blocks 1-12 in the spaces provided on the blank form. Next, describe the responsibilities and duties of the subject position in your own words in accordance with the specific instructions provided below for Preliminary Preparation and for Sections I through III. It is essential that this information be complete and accurate. If necessary, use additional paper for completion of Sections I through III. These Sections should be typed or completed on a word processor by using the same number and heading format as that shown on the instructions.

Upon completion of the entire description, sign and date the form in the space provided on the preceding page (Certification). The position description should be completed by the supervisor. The description should be reviewed with the employee for his/her acknowledgment of it as a complete and accurate description of assigned responsibilities and duties, and signed by the employee in the space provided. Any differences should be resolved at this time. The form should then be referred to the higher levels of management for review, approval and signature as further provided, or further clarification or correction, if needed. Three copies of the form should be prepared. The original and one copy should be forwarded to your agency personnel office, and the third copy retained in your departmental files or as otherwise instructed.

Preliminary Preparation: The following **Four Step Method** has been designed to aid you in gathering reference materials and organizing the information you will need to describe the responsibilities and duties of the position:

1. Review available program data, work methods, existing work plans, procedural standards or guides, written instructions, etc., which are relevant to the position.
2. Review the organizational structure and determine how any changes have affected the position.
3. Identify the major responsibilities of the position. Responsibility is accountability for procedures, solutions, programs, services, and decisions.
4. Define the duties and tasks using the questions provided. Duties are the component elements or actions assigned to a position. Duties are made up of tasks. Tasks are the most basic element of work. A task can be defined as an action or action sequence to accomplish an objective.

SECTION I. GENERAL INFORMATION

The following questions are designed to provide a general description of the organizational unit to which the position is assigned, the reason the position exists, reporting relationship and special work considerations. *It is important that you, as the supervisor, provide clear and complete answers about the position being described, written in a narrative format. Answers should be as concise as possible.*

- A. Give a general description of the organizational unit to which this position is assigned. Include purpose of the unit, types of activities and services provided, and other general information that will provide understanding of the overall scope of operational activities. Include any unusual aspects of the work schedule.
- B. Briefly narrate the major purpose of this position. For supervisory positions, state the total number of employees for which the position is responsible. Also, state the name and classification titles of employees who report directly to this position. If supervision is over one or more organizational units, give the name of each unit, the name and title of unit head, and the titles and number of positions in each unit.
- C. Work Schedule: State the normal work schedule of the position (days and hours), and whether any shift or seasonal variances are required. If the position is supervisory, describe any shift operations directly supervised.
- D. Change in Responsibilities or Organizational Relationship: For an existing position, provide a brief explanation of the basis and purpose of any change in responsibilities and/or reporting relationships since the previous description was prepared.

SECTION II. DUTIES AND RESPONSIBILITIES

A. Description of responsibilities and duties: This section (II) comprises the main body of the position description. Describe the responsibilities and duties of the position. Because the amount of information needed varies among positions, Part A on the form has been left open ended so that you may insert additional paper, if needed. Use narrative statements to describe the responsibilities and duties. Check the box for one of the following arrangements:

- (1) Order of importance: Categorize, arrange and number the work by major responsibility in rank order of importance and describe the duties and tasks of each; or,
- (2) Sequential order: Describe the position in terms of the sequence of the work. If this method is used, indicate with a number the relative rank order of importance of each responsibility, (i.e., 1, 2, 3, etc.).

Indicate on the form which arrangement you choose. Be sure to indicate the percentage of time spent on each responsibility as shown in the left margin.

Place an asterisk (*) in the left margin by each essential job function. Essential functions are the fundamental job duties, meaning the position exists to perform the function; there is a limited number of employees among whom the performance of the function can be distributed; and/or the incumbent is hired for experience or ability to perform the function due to its high specialization. The Americans With Disabilities Act of 1990 (ADA) and associated Federal regulations protect qualified individuals with disabilities from discrimination in all areas of employment. To be considered qualified, an individual must be able to perform the essential functions of a position, with or without reasonable accommodation. It is imperative that essential functions be identified appropriately so that there is no discrimination against persons with disabilities.

For positions which supervise other employees, describe the responsibilities and duties covering the following:

1. Planning: Setting programmatic or operational goals.
2. Organizing and Directing Work: Involvement in directing day-to-day operations.
3. Financial Management: Determining budgetary requirements and managing operational budgets.
4. Review: Review of work for conformance with instructions and objectives of the organization.
5. Personnel: Describe the extent of involvement in the following.
 - ▶ Orientation, initial and on-going training
 - ▶ Work planning and performance review
 - ▶ Counseling and disciplining employees
 - ▶ Resolving grievances
 - ▶ Selection of employees
 - ▶ Salary recommendations
 - ▶ Designing positions and preparing descriptions
 - ▶ Equal Employment Opportunity programs
 - ▶ Other employee programs

B. Other Position Characteristics: Following is a list of instructions concerning other important position characteristics which are either (1) involved in the work process, (2) prescribed requirements or controls concerning the performance of work, or (3) related to conditions of work. Explain each separately in the spaces provided in Section IIB on the form, considering only the essential functions of the position.

1. Accuracy Required in Work: Describe the nature and degree of accuracy required in the work.
2. Consequence of Error: Describe the greatest potential loss, harm or effect upon the organization, the State or the public should error occur in the work.
3. Instructions Provided to Employee: Describe the type of instructions which are provided and the extent to which they are verbal or written, detailed or general.
4. Guides, Regulations, Policies and References Used by Employee: List the regulations, laws, rules, policies, procedural manuals or written operational directives which guide the work of the employee or are available for reference.
5. Supervision Received by Employee: Describe when, how, and for what purpose the work is reviewed or checked, whether by observation while in progress, or upon completion.
6. Variety and Purpose of Personal Contacts: Identify the various types and purposes of contact with other persons and provide examples of the more difficult or sensitive problems or issues which must be discussed and resolved, negotiated or enforced.
7. Physical Effort: Describe and quantify the type of physical effort which is required in doing the work, its frequency of occurrence and duration.
8. Work Environment and Conditions: Describe the facility or environment in which work is performed. Describe also any confining or constraining conditions, the extent to which the employee is exposed to outdoor elements, to any irritants or potential natural or created hazards, distressing events or potentially harmful acts from others. State what safeguards are in place or available to relieve or minimize hazards.
9. Machines, Tools, Instruments, Equipment and Materials Used: List the primary tools, instruments and equipment which the employee must be able to use to accomplish the work.
10. Visual Attention, Mental Concentration and Manipulative Skills: Identify the work processes which require visual attention, mental concentration, and any accompanying manipulative skills (use of fingers, hands or feet) required to accomplish the work. Explain how frequently such effort is required and its duration.
11. Safety for Others: Identify any hazards or work procedures which could be potentially harmful to others and what precautions and rules must be followed to prevent such occurrences.
12. Dynamics of Work: Describe and explain the nature, extent, frequency and type of changes which impact upon the work, and the cause or source of such changes. If the position is supervisory, describe the degree of responsibility for assigning and implementing such changes. (changes in technology, procedures, policies, seasonal changes, etc., should be included.)

SECTION III. KNOWLEDGES, SKILLS, ABILITIES AND TRAINING/EXPERIENCE REQUIREMENTS

Considering only the essential functions of the position, address the following statements and questions concerning the beginning, or entry, (A) Knowledges, Skills, and Abilities, and (B) Training and Experience Requirements. Do not consider duties which a new employee would be trained on the job to perform.

- A. List all the skills necessary to perform the work at entry level. Include any physical abilities required.
- B. Training/Experience
 1. State the minimum level of formal training necessary to aid a person in developing the entry knowledges, skills and abilities to perform this job. Please specify areas(s) of study and courses, if possible.
 2. State other training and/or experience (consider paid work, volunteer work, or other applicable life experience) that would be necessary in addition to the formal training.

3. State what types of training and/or experience (paid work, volunteer work, etc.) which might be substituted as being equivalent to the formal training.

C. Identify any license or certification required by statute to perform the duties of this position. If so, describe and identify the statute.

SECTION IV. CERTIFICATION

Refer to page 1, General Instructions.

**Checklist for Physical Activities and Requirements, Visual Acuity,
and Working Conditions of the Position**

1. Physical Activity of Position (please check all blocks that apply)

- A. Climbing: Ascending or descending ladders, stairs, scaffolding, ramps, poles, and the like, using feet and legs and/or hands and arms. Body agility is emphasized. This factor is important if the amount and kind of climbing required exceeds that required for ordinary locomotion.
- B. Balancing: Maintaining body equilibrium to prevent falling when walking, standing, or crouching on narrow, slippery or erratically moving surfaces. This factor is important if the amount and kind of balancing exceeds that needed for ordinary locomotion and maintenance of body equilibrium.
- C. Stooping. Bending body downward and forward by bending spine at the waist. This factor is important if it occurs to a considerable degree and requires full use of the lower extremities and back muscles.
- D. Kneeling: Bending legs at knee to come to a rest on knee or knees.
- E. Crouching: Bending the body downward and forward by bending legs and spine.
- F. Crawling: Moving about on hands and knees or hands and feet.
- G. Reaching: Extending hand(s) and arm(s) in any direction.
- H. Standing: Particularly for sustained periods of time.
- I. Walking: Moving about on foot to accomplish tasks, particularly for long distances or moving from one work site to another.
- J. Pushing: Using upper extremities to press against something with steady force in order to thrust forward, downward, or outward.
- K. Pulling: Using upper extremities to exert force to draw, drag, or tug objects in a sustained motion.
- L. Lifting: Raising objects from a lower to a higher position or moving objects horizontally from position to position. This factor is important if it occurs to a considerable degree and requires the substantial use of the upper extremities and back muscles.
- M. Fingering: Picking, pinching, typing, or otherwise working, primarily with fingers rather than the whole hand or arm as in handling.
- N. Grasping: Applying pressure to an object with the fingers and palm.
- O. Feeling: Perceiving attributes of objects, such as size, shape, temperature, or texture by touching with skin, particularly that of fingertips.
- P. Talking: Expressing or exchanging ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.
- Q. Hearing: Perceiving the nature of sounds at normal speaking levels with or without correction. Ability to receive detailed information through oral communication, and to make fine discriminations in sound.
- R. Repetitive motions: Substantial movements (motions) of the wrists, hands, and/or fingers.

2. Physical Requirements of Position (please check only one block)

- A. Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.
- B. Light Work: Exerting up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for Sedentary Work and the worker sits most of the time, the job is rated for Light Work.
- C. Medium work: Exerting up to 50 pounds of force occasionally, and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
- D. Heavy Work: Exerting up to 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
- E. Very Heavy Work: Exerting in excess of 100 pounds of force occasionally, and/or up to 50 pounds of force frequently, and/or in excess of 20 pounds of force constantly to move objects.

3. Visual Acuity Requirements Including Color, Depth Perception, and Field of Vision (please check only one block)

- A. The worker is required to have close visual acuity to perform an activity such as: preparing and analyzing data and figures; transcribing; viewing a computer terminal; extensive reading; visual inspection involving small defects, small parts, and/or operation of machines (including inspection); using measurement devices; and/or assembly or fabrication of parts at distances close to the eyes.
- B. The worker is required to have visual acuity to perform an activity such as: operate machines such as lathes, drill presses, power saws and mills where the seeing job is at or within arm's reach; perform mechanical or skilled trade tasks of a non-repetitive nature such as carpenters, technicians, service people, plumbers, painters, mechanics, etc.
- C. The worker is required to have visual acuity to operate motor vehicles or heavy equipment.
- D. The worker is required to have visual acuity to determine the accuracy, neatness, and thoroughness of the work assigned (i.e., custodial, food services, general laborer, etc.) or to make general observations of facilities or structures (i.e., security guard, inspection, etc.).

4. Working Conditions of Position (please check all blocks that apply)

- A. The worker is subject to inside environmental conditions: Protection from weather conditions but not necessarily from temperature changes.
- B. The worker is subject to outside environmental conditions: No effective protection from weather.
- C. The worker is subject to both environmental conditions: Activities occur inside and outside.
- D. The worker is subject to extreme cold: Temperatures typically below 32 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.
- E. The worker is subject to extreme heat: Temperatures above 100 degrees for periods of more than one hour. Consideration should be given to the effect of other environmental conditions such as wind and humidity.
- F. The worker is subject to noise: There is sufficient noise to cause the worker to shout in order to be heard above the ambient noise level.
- G. The worker is subject to vibration: Exposure to oscillating movements of the extremities or whole body.
- H. The worker is subject to hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, exposure to high heat or exposure to chemicals.
- I. The worker is subject to atmospheric conditions: One or more of the following conditions that affect the respiratory system of the skin: Fumes, odors, dusts, mists, gases, or poor ventilation.
- J. The worker is subject to oils: There is air and/or skin exposure to oils and other cutting fluids.
- K. The worker is required to wear a respirator.
- L. The worker is frequently in close quarters, crawl spaces, shafts, man holes, small enclosed rooms, small sewage and water line pipes, and other areas which could cause claustrophobia.
- M. The worker is required to function in narrow aisles or passageways.
- N. The worker is exposed to infectious diseases.
- O. The worker is required to function around prisoners or mental patients.
- P. The worker is not substantially exposed to adverse or environmental conditions (such as in typical office or administrative work).

Immediate Supervisor

Date

Employee

Date

Section or Division Manager

Date