



San Luis Obispo, CA 93407

<p>GUIDELINES FOR COMPLETING POSITION DESCRIPTION HR 120 FORM</p>
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HUMAN RESOURCES (805) 756-2236

The Position Description form (HR 120) documents job functions and the skills, knowledge, abilities, and other characteristics needed for satisfactory performance of the job. It should be updated regularly to ensure that it reflects the employee's current responsibilities. The HR 120 is used for determining correct classification or administrative level and for recruitment, selection, employee training, and employee evaluation purposes. It is maintained as an official record of the duties assigned to a position.

The HR 120 form has been designed to incorporate the changes under the Americans with Disabilities Act (ADA). Title I of the ADA prohibits discrimination against qualified individuals with physical or mental disabilities in the area of employment. ADA was designed to remove barriers that prevent qualified individuals from enjoying the same employment opportunities that are available to persons without disabilities. Based upon the need to identify the "essential" functions of the employment position, the HR 120 form has been designed to identify the essential functions as well as any physical requirements linked to specific essential functions. This list of essential functions may be updates as necessary (as the job changes) and should provide an overall representation of essential job functions.

When submitting a completed HR 120 form to Human Resources, please check the appropriate box in the upper-left of the first page, to indicate whether the form is intended to:

Recruit for a Position

Mark the appropriate line to indicate whether this is a new position or a replacement for position that was previously filled. If significant changes have occurred in the duties and responsibilities of the position and this is a request to reclassify the level prior to recruitment, please attach a memo of explanation indicating what changes have occurred and the requested classification level.

Request a Classification Review

Attach a cover memo to explain why this position is being recommended for classification review, specifically indicating what changes have occurred. For an employee initiated request, the memo must be signed by the employee confirming that the request for review is self-initiated. For an employer-initiated request, the memo must be signed by the supervisor and/or program manager.

Provide an Update for the File

This is appropriate when updating changes that have occurred in position duties and responsibilities, but it is not anticipated that these changes will impact current classification level. These will be reviewed by Human Resources and will be filed, unless further action is deemed necessary. A copy is placed in the employee's personnel file.

PLEASE NOTE: A current organizational chart (including names and classification titles) must be attached.

The HR 120 form is available in Word and PDF formats on Human Resources on-line forms website located at <http://www.afd.calpoly.edu/hree/forms>.

When completing the HR 120 form, be as clear, concise, and complete as possible. Omit sections that do not apply to the job. If more space is needed, attach additional pages identified with name, classification,

department, and date at the top. If you are using the electronic format in Word, you may enter as much information as needed on the form itself.

Below are instructions and examples for completing each section of the HR 120 form. Questions can also be directed to Human Resources.

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A. PURPOSE OF POSITION

Briefly describe the purpose of the department and the role of this position within the department.

Example:	The "X" Department is a major academic unit within the College of "Y". The Department provides a BS degree in "Z", and currently has an enrollment of 200 students. The Department is comprised of a Department Chair, 25 full-time faculty, 10 part-time faculty, with clerical/administrative support being provided by two staff support positions. The purpose of this position is to provide typing and general clerical support to the faculty and serve as the office receptionist.
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B. REQUIRED LICENSES, CERTIFICATES, DEGREES, CREDENTIALS

List any licenses, certificates, degrees or credentials required by Federal or State Law or University Regulations to perform the duties assigned to this position. Indicate the required frequency of renewal, if applicable.

Example:	A Nurse Practitioner position requires incumbents to have a Registered Nurses license with the State of California. Clinical Laboratory Technologists require licensure by the State of California. Various classifications require valid California Driver's License, Class B or Class C.
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C. SIGNATURES

The HR 120 form must be signed by the appropriate supervisors and managers before it is considered certified and complete.

D. SUPERVISORY RESPONSIBILITY - POSITIONS SUPERVISED

List name, classification level, and time base for each employee supervised. For time base, indicate full-time equivalent percentages (e.g., an employee who works 20 hours per week would be considered half time and percentage would be .50).

Indicate whether the supervision given is direct or indirect.

- Direct supervision is given when employees report directly to you.
- Indirect supervision is given when employees report to you through another person.

Example: You directly supervise an Administrative Support Assistant II (ASA II) who reports directly to you. The ASA II position supervises an ASA I position. You would have indirect supervision for the ASA I.

Describe the extent of the supervisory authority for employees supervised to include such areas as: hiring decisions; scheduling; assigning work; performance evaluations; discipline, etc.

Examples:

Name	Class, Title	Time Base	Type Supervision	Supervisory Authority
Jones	ASA II	1.0	Direct	Recommends who will be hired. Assigns work. Determines priorities. First-line supervisor for evaluation purposes.
Long	ASA I	.75	Indirect	Recommends who will be hired. Second-line supervisor for evaluation purposes.
Smith	Student Assistant	.25	Direct	Independent hiring authority Assigns work.

E. SCOPE OF AUTHORITY

Describe the extent of authority for making decisions, recommendations, commitments, devising or revising ways of doing work; guidelines with which duties are performed; responsibility for development, interpretation and/or implementation of policies and procedures; involvement with budget, size of budget, and extent of signature authority.

Example:	The incumbent has authority to approve supplies and services expenditures up to \$500.
	The incumbent interprets school and university policies in providing information to faculty, student and staff.
	The incumbent must have working knowledge of Campus Administrative Policies (CAP).
	The incumbent is responsible for monitoring and reconciling departmental accounts totaling \$1.2 million dollars. Monies are derived from contracts, grants, and state funds. The incumbent does not have signature authority for any of the funds.

F. PURPOSE AND NATURE OF WORK RELATIONSHIPS

Define the working relationships with people on- and off-campus (other than supervisor or people supervised) that incumbent interacts with on a continuing basis, and how often this interaction occurs.

Examples:

Contact	Purpose	How Often
Purchasing and Stores	To solicit information in requisition process	Weekly
Accounting Technician	To resolve financial transactions	Daily
ABC Company	To negotiate cost of supplies or materials	Monthly
Sally Simon, Union Rep	To resolve grievance and employee relations problems	As needed
Frank Fisher, Superintendent of Schools	Community relations	Quarterly

G. JOB FUNCTIONS

There are two types of job functions:

1. **Essential Job Functions** are critical and fundamental responsibilities of the position. The incumbent must be able to perform these functions with or without reasonable accommodation.
2. **Other Job Functions** are those duties that are performed either very infrequently or could be performed by others without altering the underlying reason the job exists.

In completing the HR 120, be sure to distinguish between those functions that are essential to the position and those other functions. On the HR 120 form, describe each job function in a separate paragraph. Number each function and list the functions in descending order of importance (the numbering will be required to cross-reference each job function when completing the next two sections of this form).

Factors to consider in determining essential job functions include:

- Is the reason the position exists to perform this function?
- Are there a number of other employees available to perform the function?
- Is degree of expertise or skill required to perform this function highly specialized? Was incumbent hired for his/her expertise or ability to perform the function?
- How much time is spent performing the function? What are the consequences of not requiring the incumbent to perform the function?

Examples of “Essential” and “Other” job functions:

Inputting data would be considered an essential function of the job if the employee spends a significant part of his/her time performing that duty.

If an employer infrequently requires an analyst to perform maintenance duties, such a task would not be considered essential.

If an individual is hired to catalogue new library materials received on a weekly basis, then cataloging materials would be considered an essential function because that is the only reason the position exists.

In a job requiring answering the telephone and directing calls, these functions should be listed as essential. If the job also required the occasional greeting of visitors and some occasional typing, and several other personnel in the office are available to perform these functions, these tasks would be listed as “other functions”.

H. SKILLS, KNOWLEDGE, AND ABILITIES

List in descending order of importance the skills, knowledge, and abilities required for a fully trained employee to satisfactorily perform each function and match to corresponding job function. This information establishes the relative importance of skills, knowledge, and abilities in the selection process.

Example:

<i>Function Reference</i>	<i>Skills, Knowledge, and Abilities</i>
1	Ability to recognize, spell, and use technical (i.e., engineering, medical, chemical) terminology properly; knowledge of correct spelling and grammar.
1	Typing skills to quickly and accurately produce letters, memos, standard office forms, and statistical tables.
1	Ability and skill to proficiently operate a computer for word-processing and spreadsheet projects.
1	Knowledge of a variety of word-processing software packages and their applications
1	Excellent proofreading skills for editing manuscripts and correspondence.

I. PHYSICAL CHARACTERISTICS

On the Position Description HR 120 form, when applicable, describe the physical characteristics of the essential job functions to be performed. Describe specific tasks which must be accomplished and the environment in which they are performed, and match to the corresponding job function. Do not include statements that prescribe how a function is or should be done; these constitute artificial barriers for qualified

individuals who could perform the job with reasonable accommodation. Keep in mind the employee must be able to safely and effectively perform the essential functions of the job.

In selecting verbs to describe actions, the focus should be on the purpose of the function and the result to be accomplished, rather than the manner in which the function is presently or traditionally performed.

For example, for a computer data entry position, the essential function is not “keyboarding” information, but rather “entering data” into the computer, a task that may be performed in a number of different ways, only one of which is typing, e.g., a disabled applicant/employee may use an assistive device to enter data. Similarly, an essential function of a job on a loading dock may be to “move heavy packages from the dock to a storage room” rather than to “lift and carry” packages from the dock to the storage room.

Example:

Function Reference	Skills, Knowledge, and Abilities
All	Working in an area where there is constant traffic and noise from typewriters, telephone conversations, computer printers, etc.
1	Safely moving boxes of supplies weighing up to 70 pounds from a hand truck or cart to a 3” high shelf.
1, 2	Retrieving books from shelves, ranging from 5” to 72” high in 36” aisles, frequently throughout the day.
1	Legibly entering information in small spaces on pre-printed forms several times a day.
All	Communicating in person or by telephone with the general public repeatedly throughout each day.
1	Working with a computer keyboard to enter and retrieve information.

J. SPECIAL CONDITIONS OF EMPLOYMENT

List any work behaviors or conditions of employment which are needed to perform the functions of the job, but which are not skills, knowledge, abilities, or physical characteristics. The job-relatedness of special conditions of employment must be documented by reference to specific job functions, departmental or University rules and standards, and/or state or federal laws.

Example:	Must be able to work occasional overtime, usually during the end of the quarter to meet instructional needs.
	Must be able to work occasional overtime and rotate evening, weekend, and holiday “on-call” hours per departmental staffing rules.
	No eating, drink, or smoking in the work area.
	Must be able to work variable hours to provide coverage for staff vacations.