



BUREAU OF THE
Fiscal Service
U.S. DEPARTMENT OF THE TREASURY

How to Write a Position Description (PD): The Classification Process

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Agenda

- I. Position Descriptions (PD)
- II. Preparing to Write the PD
- III. How to Write Duty Statements
 - Tasks vs. Duties
 - What to Include
 - Projected and Temporary Duties
- IV. How to Write Factor Level Descriptions
- V. Types of PD Classifications
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 - Pen & Ink
 - Redescription
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- VI. Questions & Answers

Position Descriptions (PDs)

Position Descriptions

A **Position Description (PD)** is an official record of the work assigned by management to an employee.

OPM federal Classification Standards provide the basis for determining a position's **title**, occupational **series**, and **grade**.

PDs provide:

- Qualifications used in **filling jobs**
- Qualifications for **promoting employees**
- Determine **performance standards** and training needs

Position Descriptions

1. PD Document
2. Alt OF-8 Form

Position Descriptions

PD Document

- Introduction
- Major Duties & Responsibilities
- Factor Level Descriptions

Refer to Handout #1

HUMAN RESOURCES SPECIALIST

GS-201-12

PD# FYXXXX

CAREER LADDER:

GS-0201-12, PD# FYXXXX

GS-0201-11, PD# FYXXXX

GS-0201-09, PD# FYXXXX

INTRODUCTION

The position is located in the Department; Office of the Chief Human Capital Officer (OCHCO); Office of Human Capital Services; Employee Assistance Program (EAP), Health, and Wellness Division; Reasonable Accommodations Branch. The branch manages the department's disability program and performs the case work associated with requests for hardship and reasonable accommodation.

This position reports to a Supervisory Human Resources (HR) Specialist. The primary purpose of this position is to serve as an analyst and advisor in support of the agency's hardship, disability, and reasonable accommodation case services that anticipate and satisfy client requirements; support Departmental initiatives; and integrate with other Federal, Department, and OCHCO activities and programs.

MAJOR DUTIES & RESPONSIBILITIES

Serves as a point of contact and provides authoritative advice on disability, hardship, and reasonable accommodation services under the cognizance of the branch.

Plays a role in ensuring that disability, hardship, and reasonable accommodation programs satisfy agency and OCHCO objectives and comply with governing laws, regulations, and policies. Identifies opportunities for innovation and proposes actions to enhance the quality and timeliness of services, including the development of new or modified branch work methods, approaches, or procedures for delivering program services.

Analyzes employment practices to determine barriers to employment and reasonable accommodation of affected individuals. Develops corrective actions to increase the support and encouragement of employees affected by hardship, or to increase

Position Descriptions

Alt OF-8 Form

- Duty Station, Supervisory Status, Multiple Incumbents, etc.
- Security Clearance, Bargaining Unit, etc.
- Signed by Supervisor & Classifier

Refer to Handout #2

POSITION DESCRIPTION				Request#	1. Agency Position No.
2. Reason for Submission <input type="checkbox"/> Redescription <input type="checkbox"/> New <input type="checkbox"/> Reestablishment <input type="checkbox"/> Other	3. Service <input type="checkbox"/> Hdqtrs <input type="checkbox"/> Field	4. Employing Office Location	5. Duty Station	6. OPM Certification No.	
7. Fair Labor Standards Act <input type="checkbox"/> Exempt <input type="checkbox"/> Nonexempt		8. Financial Statements Required <input type="checkbox"/> Executive Personnel Financial Disclosure <input type="checkbox"/> Employment and Financial Interests		9. Subject to IA Action <input type="checkbox"/> Yes <input type="checkbox"/> No	
Explanation (Show any position replaced)		10. Position Status <input type="checkbox"/> Competitive <input type="checkbox"/> Excepted (Specify in Remarks) <input type="checkbox"/> SES (Gen) <input type="checkbox"/> SES (CR)	11. Position is: <input type="checkbox"/> Supervisor or Manager <input type="checkbox"/> Supervisor (CSRA) <input type="checkbox"/> Mgmt. Official (CSRA) <input type="checkbox"/> Leader <input type="checkbox"/> Team Leader <input type="checkbox"/> All Other	12. Sensitivity <input type="checkbox"/> 1-Non-Sensitive/Low Risk <input type="checkbox"/> 2-Non-Critical Sensitive <input type="checkbox"/> 3-Critical Sensitive <input type="checkbox"/> 4-Special Sensitive <input type="checkbox"/> 5-Moderate Risk Public Trust <input type="checkbox"/> 6-High Risk Public Trust Second Sensitivity Code <input type="checkbox"/> C-Computer ADP <input type="checkbox"/> N-Non-Computer	13. BU Code 14. Agency Use Competitive Level Code: <input type="checkbox"/> Physical Req. <input type="checkbox"/> Drug Test Req. FPL
15. Classified/Grade by a. U.S. Office of Personnel Management b. Department, Agency Or Establishment c. Second Level Review d. First Level Review	Official Title of Position		Pay Plan	Occupational Code	Grade
16. Organizational Title of Position (if different from official title)			17. Name of Employee (if vacant, specify)		
18. Department, Agency, or Establishment			c. Third Subdivision		
a. First Subdivision			d. Fourth Subdivision		
b. Second Subdivision			e. Fifth Subdivision		
20. Supervisory Certification. I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationships, and that the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that false or misleading statements may constitute violations of such statutes or their implementing regulations.					
a. Typed Name and Title of Immediate Supervisor			b. Typed Name and Title of Higher-Level Supervisor or Manager (optional)		
Signature		Date	Signature		Date

Preparing to Write the PD

Preparing to Write the PD

- Keep a written list describing responsibilities
- Discuss with employees, supervisors, and management officials
- Review samples of related PDs
- Observe work in progress
- Review organizational or program material

How to Write Duty Statements

How to write Duty Statements

Major Duties section:

“What does the employee do in this position?”

- Briefly describe in plain, clear language
- Order the duties by **importance** or **function**
 - Place duties into “buckets”; describe only the ***major*** duties

Tasks vs. Duties

PD is *not* an exhaustive list of all work activities.

- “Returns phone calls and responds to emails.” Task or Duty?
- “Provides customer service to numerous callers daily in a help desk call center for travel/accounting systems.” Task or Duty?
- “Uses personal computer and software including word processors and spreadsheets.” Task or Duty?
- “Develops corrective actions to increase employee hardship support, or to increase awareness of reasonable accommodation for the disabled.” Task or Duty?

Tasks vs. Duties

- “Participates in training sessions, as needed.” Task or Duty?
- “Drafts responses to correspondence and general inquiries.” Task or Duty?
- “Devises and conducts risk assessments to identify areas of potential vulnerability for operating systems used throughout the Office.” Task or Duty?
- “Prepares economic research reports which describe and assess the adequacy of methodology and data employed, and discuss policy and regulatory implications.” Task or Duty?

How to write Duty Statements

Use an active tense:

(*Action Verb*) + (To Whom or What) + (To Produce What or Why? How?)

- ***Designs*** art work for multicolor posters to meet specified requestor needs
- ***Establishes*** food standards and ***plans*** menus complying with nutritional and cost allocations
- ***Develops*** plans, specifications, and estimates for urban expressways with separated intersection, dividing strips, weaving lanes, and ramps.

What to include in Duty Statements

- **Regular and/or Recurring Duties**
 - Represent primary reason for position to exist
 - Occupy most of the employee's time
 - *Grade*-controlling duties = **25% or more** of duty hours
 - e.g., 10 hours in a 40-hour work week

What to include in Duty Statements

- **Minor Duties**

- Can cover by including statement: “Performs other duties, as assigned.”

Refer to Handout #3

- If you must include **incidental** or **occasional** duties:

1. Specify frequency:

- “Once a month...”
- “In the absence of...”
- “As requested...”
- “In emergencies...”

2. Include statement: “The following duties are performed for less than 25 percent of the time.”

Projected and Temporary Duties

- **Projected duties**
 - Can classify a PD based on projected duties
 - Position should be reviewed within a reasonable time (i.e. six months) after work is being performed
- **One-time only/Temporary duties**
 - Do not include in PD
 - Generally do not affect position grade/series
 - *If* duties extend over long periods of time (i.e. several months), position should be re-evaluated

How to Write Factor Level Descriptions (FLDs)

Writing Factor Level Descriptions (FLD)

Two most common FLD formats:

Nine (9) Factors = Non-Supervisory

FACTOR LEVEL DESCRIPTIONS

FACTOR 1 – KNOWLEDGE REQUIRED BY THE POSITION

FACTOR 2 – SUPERVISORY CONTROLS

FACTOR 3 – GUIDELINES

FACTOR 4 – COMPLEXITY

FACTOR 5 – SCOPE AND EFFECT

FACTOR 6 – PERSONAL CONTACTS

FACTOR 7 – PURPOSE OF CONTACTS

FACTOR 8 – PHYSICAL DEMANDS

FACTOR 9 – WORK ENVIRONMENT

Six (6) Factors = Supervisory

FACTOR LEVEL DESCRIPTIONS

FACTOR 1 – PROGRAM SCOPE AND EFFECT

FACTOR 2 – ORGANIZATIONAL SETTING

FACTOR 3 – SUPERVISORY AND MANAGERIAL AUTHORITY EXERCISED

FACTOR 4 – PERSONAL CONTACTS

FACTOR 5 – DIFFICULTY OF TYPICAL WORK DIRECTED

FACTOR 6 – OTHER CONDITIONS

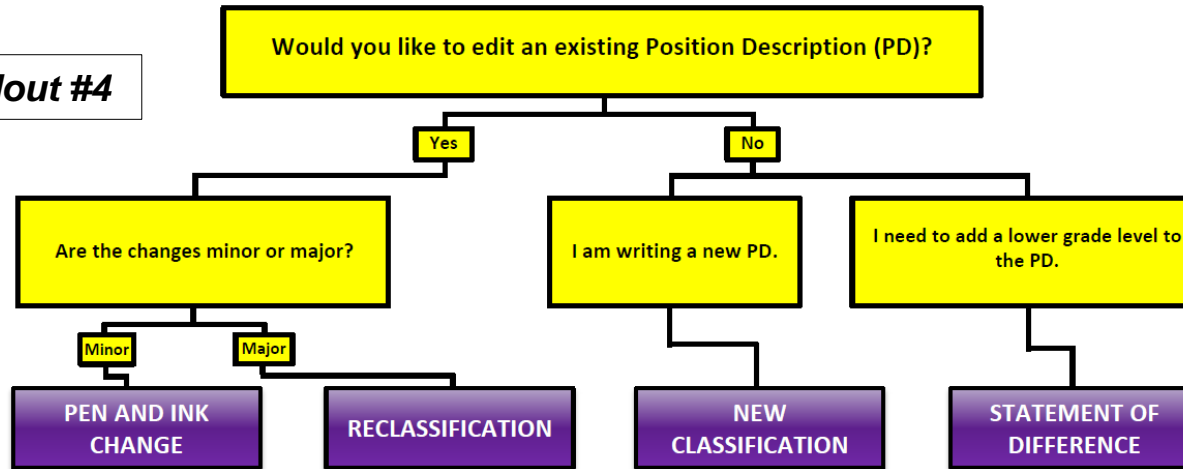
Writing Factor Level Descriptions (FLD)

- Utilize:
 - Handout #1: PD Template/Cheatsheet
 - Related/Sample PDs with same series and grade

Types of PD Classifications

Types of PD Classification Requests

Refer to Handout #4



- | | | |
|----|-------------------------|-------------------------------------|
| 1. | New Classification | Create entirely new PD |
| 2. | Pen & Ink | Minor changes to existing PD |
| 3. | Redescription | Replace an existing PD |
| 4. | Statement of Difference | Establish a Career Ladder |

New Classification

- Establishes a new position/Job Code
- New PD # is generated
- Produces new Alt OF-8 for signature
- Only classify positions at the Full Performance Level (FPL)

New Classification Process

- **Strategic Conversation**

- Position background/purpose
- Organization Mission/Function
- Paramount knowledges, “ideal” candidates
- Work examples

- **PD Review & Preliminary Draft Approval**

- Formatting
- Accurately describing the work
- Remove and/or add duties

- **Alt OF-8 Signature**

- Pay attention to:

- Duty Station (#5), IA Action (#9), Organizational Location (#18)

Refer to Handout #2

Which type of PD Request?

Editing existing PDs

1. Minor Changes
2. Major Changes (Replace)
3. Add a Career Ladder

Editing existing PDs

1. Minor Changes = **Pen & Ink**

- PD # stays the same
- Requires new Alt OF-8 signature
- Why you may need one:
 - Organization name change due to Reorganization
 - A couple duties have changed slightly and need updated
 - Updating an Organizational Title

Pen & Ink Process

- **Classifier reviews to:**
 - Ensure changes don't affect the position's title, series, or grade.
 - Check which employees are sitting on the PD
- **Supervisor may be asked:**
 - Reason for the changes
 - Which employees they're intending to be affected
- **Updated Alt OF-8 sent to Supervisor:**
 - **Requires a new signature** in order to effect PD changes

Editing existing PDs

2. Major Changes = **Redescription**

- *Replaces* an existing PD
- New PD # and New Alt OF-8 for signature
- Why you may need one:
 - Position realigned under new Office/Mission
 - Several duties changed significantly
 - Several duties need added and/or removed
 - Change in leadership responsibilities

Redescription Process

- Essentially *same process* as a New Classification
- Be prepared to discuss:
 - Reason for the Redescription
 - How and why the position has changed
 - Organization Mission/Function
 - Which employees will be affected
 - How Redescription could impact Organization.

Editing existing PDs

3. Adding a Career Ladder = **SOD**

- Establishes a Career Ladder:
 - Existing PD becomes Full Performance Level (FPL)
 - Grades below FPL are called
Statement of Difference (SOD) PDs
- Separate PD and PD # for each grade level
- Signed Alt OF-8 required for each grade level

SOD Process

- Produces a generic PD at each grade level
 - Option to fully write duties
- SODs refer to FPL PD for Duties
- Generates individual Alt OF-8s
 - Each requires a **Supervisor's signature**
- Reassignments to a Career Ladder PD:
 - Must have competed for the FPL

Questions & Answers

Contact Information

Primary Contact

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