I. Position Descriptions (PD)

II. Preparing to Write the PD

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IV. How to Write Factor Level Descriptions

V. Types of PD Classifications
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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
# 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
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
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.”

- “Provides customer service to numerous callers daily in a help desk call center for travel/accounting systems.”

- “Uses personal computer and software including word processors and spreadsheets.”

- “Develops corrective actions to increase employee hardship support, or to increase awareness of reasonable accommodation for the disabled.”
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:

<table>
<thead>
<tr>
<th>Nine (9) Factors = Non-Supervisory</th>
<th>Six (6) Factors = Supervisory</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FACTOR LEVEL DESCRIPTIONS</strong></td>
<td><strong>FACTOR LEVEL DESCRIPTIONS</strong></td>
</tr>
<tr>
<td>Factor 1 – Knowledge Required by the Position</td>
<td>Factor 1 – Program Scope and Effect</td>
</tr>
<tr>
<td>Factor 2 – Supervisory Controls</td>
<td>Factor 2 – Organizational Setting</td>
</tr>
<tr>
<td>Factor 3 – Guidelines</td>
<td>Factor 3 – Supervisory and Managerial Authority Exercised</td>
</tr>
<tr>
<td>Factor 4 – Complexity</td>
<td>Factor 4 – Personal Contacts</td>
</tr>
<tr>
<td>Factor 5 – Scope and Effect</td>
<td>Factor 5 – Difficulty of Typical Work Directed</td>
</tr>
<tr>
<td>Factor 6 – Personal Contacts</td>
<td>Factor 6 – Other Conditions</td>
</tr>
<tr>
<td>Factor 7 – Purpose of Contacts</td>
<td></td>
</tr>
<tr>
<td>Factor 8 – Physical Demands</td>
<td></td>
</tr>
<tr>
<td>Factor 9 – Work Environment</td>
<td></td>
</tr>
</tbody>
</table>
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

Would you like to edit an existing Position Description (PD)?

- Yes
  - Are the changes minor or major?
    - Minor: PEN AND INK CHANGE
    - Major: RECLASSIFICATION
  - I am writing a new PD.
- No
  - I need to add a lower grade level to the PD.

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

Refer to Handout #4
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
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.
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

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