



# PennState

## Human Resources

### Job Responsibilities Worksheet (JRW) Application

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## Overview:

The purpose of the Job Responsibilities Worksheet (JRW) is to document the current responsibilities of a position. It focuses on a specific position, provides details regarding the primary job duties and required competencies, and outlines the job scope and supervisory responsibility (if applicable). At Penn State, this document serves as a staff employee's job description. Unlike a static description, the JRW allows the manager and employee to collaborate on how a position functions, while allowing for regular updates.

The information provided in the JRW correlates to a staff job profile and level, therefore, it is important that the JRW accurately represents the way the position is currently functioning. The JRW also plays a key role in setting goals and expectations, as well as evaluating performance.

## Getting Started:

The employee and supervisor must discuss the position to ensure mutual understanding. The employee typically works with their supervisor to create their JRW. For newly created positions, the supervisor will complete the JRW to provide to their employee upon hire.

All sections of the JRW must be completed. Incomplete or missing information may lead to an inaccurate reflection of the nature of the position; and in the case of a job review request, may delay the process.

There are six main sections of the JRW, which are outlined below.

### Position Summary:

In 2-4 sentences, provide a high level overview of the primary purpose of the position. Keep in mind you'll be able to elaborate in more detail about the duties, scope, responsibilities later in the JRW.

Examples of well-written position summaries:

- "The purpose of this position is to serve as an admission counselor for Penn State World Campus. This includes interacting with prospective students via email, phone, webinars, and face-to-face, planning and coordinating recruitment events and communication campaigns, and coordinating the World Campus Alumni Ambassador Program."

- “This position is responsible for the leadership, strategic direction, project management, and operations for the recently established Online Professional Education unit within Penn State Outreach and Online Education (Outreach). In addition to these strategic and operational roles, a significant portion of this resource must be devoted to developing and fostering high level relationships with University leaders within Outreach, the administration, and Colleges, including: Deans, Assoc. Deans, department heads, and faculty in order to understand potential opportunities within academic units and connect them to the most appropriate resource to help them address their needs.”

**Primary Duties:**

List between three (3) and ten (10) primary duties of this position and estimate the percentage of time spent on each duty over a given period of time. When indicating the percentage of time spent on each duty, consider what is performed over a given period of time. Describe the position as it is being performed today and not as it might be in the future or as you think it should be (except in cases where a JRW is being completed for a vacant or new position).

Order the duties based on percentage of time, from most to least. The percentages must total 100%. Each duty should not be smaller than 5% or greater than 50%. The chart below provides assistance in determining percentage of time.

<b>PERCENT TO HOUR CONVERSION</b>					
<b>% of Time</b>	<b>Day (8 hrs)</b>	<b>Week (40 hrs)</b>	<b>Month (173 hrs)</b>	<b>Quarter (520 hrs)</b>	<b>Year (2080 hrs)</b>
<b>5%</b>	0.4	2	9	26	104
<b>10%</b>	0.8	4	17	52	208
<b>15%</b>	1.2	6	26	78	312
<b>20%</b>	1.6	8	35	104	416
<b>25%</b>	2	10	43	130	520
<b>30%</b>	2.4	12	52	156	624
<b>35%</b>	2.8	14	61	182	728
<b>40%</b>	3.2	16	69	208	832
<b>45%</b>	3.6	18	78	234	936
<b>50%</b>	4	20	87	260	1040

Strive to be accurate and concise in your answers. Be specific to the work being performed on a day-to-day basis. Use words which convey a good understanding of the work being performed rather than vague generalities.

Examples of well-written primary duties:

- “Assist faculty with routine requests such as scheduling conference rooms for meetings, prepare seminar announcement, and copy, assemble packets and folders of information.” (35%)
- “Provide leadership in decision making, resolving problems, developing procedures, initiating new programs and engaging faculty, students and staff to meet the goals of the unit. Participate in strategic planning for future faculty led programming which is the fastest area of growth in the Education Abroad unit.” (20%)

### **Position Scope:**

Briefly describe the extent or range of operation for the position. Provide examples of the size and degree of activity over which this position has control or has impact, such as size of budgets, level of fiscal responsibility (management vs. proxy), number of students, number of faculty supported, and extent of impact (if it is department-wide, college-wide, and/or University-wide).

Examples of well-written position scopes:

- “This position supports two tenured faculty, three fixed-term faculty, 22 part-time faculty, 86 residential undergraduate majors, 527 online undergraduate students, 32 residential graduate students, and 2000+ alumni.”
- “This position provides direct support and advocacy related to job and internship development for Career Services in the western region, which includes the following six campuses: Beaver, DuBois, Fayette, Greater Allegheny, New Kensington, and Shenango. The Career Services Specialist (Regional Job and Internship Developer) works directly with six Career Coordinators in the region.”

## Position Specific Competencies (Competencies Required):

**NOTE: As of the 2019-2020 Performance Cycle, this section is optional and can be bypassed for the annual JRW process. For new positions and the job review process, completion of this section is strongly encouraged.**

Competencies are the identified set of knowledge, skills, abilities, and behaviors needed to perform a job successfully and that they can be measured and/or observed. At Penn State, the five core competencies serve as the foundation for development and performance management.

The five core competencies are:

**Effective Knowledge** - the sum total of education, training, skill and experience required to perform the job to the normally expected standard. This encompasses the depth, scope, integration, and application of skills within and outside the body of knowledge or specialty applicable to an individual job category.

**Accountability and Self-Management** - the degree to which a position requires self-direction and the degree of personal accountability required for the work accomplished. It involves responsibility for oversight and providing reports of actions, causes, and results.

**Teamwork and Leadership** - the degree to which a position must function in a group and the degree of leadership exercised.

**Communication** - the nature and scope of the communication activity required by a position on a regular basis.

**Innovation and Problem Solving** - the type of problem resolution, quality improvement activity and/or process and procedure development undertaken in the position.

At each level of a position, all five of these competencies are used, just in different ways.

Depending on the nature of the position, staff job profiles fall under the management or non-management track. Examples of competencies for management and non-management at various levels can be found on the pages to follow.

## EXAMPLE COMPETENCIES

Competency	Non-Management	Management
<b>Effective Knowledge</b>	<p>Level 2 example:</p> <ul style="list-style-type: none"> <li>◦ Possesses knowledge of Microsoft programs, ISIS and possible access to Data Warehouse</li> <li>◦ Demonstrates intercultural competency skills to effectively communicate with sponsors and students</li> </ul>	<p>Level 2 example:</p> <ul style="list-style-type: none"> <li>◦ Demonstrates broad understanding of and appropriately applies good financial management practices</li> <li>◦ Utilizes technology to enhance decision making and improve organizational effectiveness</li> </ul>

<b>Accountability &amp; Self-Management</b>	<p>Level 5 example:</p> <ul style="list-style-type: none"> <li>◦ Accepts personal accountability for work and consequences</li> <li>◦ Is self-directed in the work and works independently without day-to-day guidance from the supervisor</li> <li>◦ Manages multiple projects and competing priorities meeting the quality standards of the unit and University</li> </ul>	<p>Level 3 example:</p> <ul style="list-style-type: none"> <li>◦ Works with direct reports to set project timelines and advance overall vision of the unit</li> <li>◦ Reviews completed work of others for conformity to policy and effectiveness of approach</li> <li>◦ Delegates more advanced tasks to others</li> </ul>
<b>Teamwork &amp; Leadership</b>	<p>Level 1 example:</p> <ul style="list-style-type: none"> <li>◦ Understands team goals and collaborates with colleagues to achieve them</li> </ul>	<p>Level 2 example:</p> <ul style="list-style-type: none"> <li>◦ Encourages others to work together as a team</li> <li>◦ Models desired behaviors and demonstrates personal commitment to the team</li> </ul>

<p><b>Communication</b></p>	<p>Level 4 example:</p> <ul style="list-style-type: none"> <li>◦ Successfully communicates with employees at all levels of the organization on a regular basis- including via face-to-face, email and other technology (i.e. Adobe Connect and Polycom)</li> <li>◦ Fosters open dialogue and actively listens to others in order to build and maintain effective and respectful working relationships throughout the University</li> </ul>	<p>Level 5 example:</p> <ul style="list-style-type: none"> <li>◦ Articulates a strong vision for increasing student enrollment with the college</li> <li>◦ Communicates complex issues clearly to a varied audience (including University leaders, employees, students and other stakeholders) in a timely, complete and accurate manner</li> </ul>
<p><b>Innovation &amp; Problem Solving</b></p>	<p>Level 3 example:</p> <ul style="list-style-type: none"> <li>◦ Recommends, enhances, and/or implements quality improvement processes and policies that have an impact on the department's operations</li> <li>◦ Applies creative thinking to develop new solutions</li> <li>◦ Embraces and presents ideas that are environmentally conscious.</li> </ul>	<p>Level 4 example:</p> <ul style="list-style-type: none"> <li>◦ Resolves complex issues</li> <li>◦ Acts decisively in effectively handling difficult problems and not just symptoms by managing risks for the department</li> <li>◦ Identifies and improve processes</li> </ul>

By understanding what competencies are and how they fit into your position, you'll be better equipped to complete your JRW. For additional information on how competencies translate in each level, review the in-depth Competency matrices found under the Additional Resources section on page 10 (in the JRW application, you can click the link within Position Specific Competencies to take you to the Core Competencies Matrix for the level your position is in).

### **Supervisory Responsibilities:**

Identify if this position has supervisory/management responsibilities for others. If this position has direct reports, indicate the number of full-time staff employees reporting to this position along with the specific employees that the position supervises/manages. Direct reports are those employees for whom you have direct supervisory responsibility and report to you on a regular basis.

If you select yes, you'll also select from one of the three options that best describes the position's supervisory and "direction of work" responsibilities:

- Minimal or no supervisory responsibilities.
- Supervisory responsibilities within a department or functional area. Responsibilities include coordinating, directing and assigning work and may also include participation in interviewing and selecting staff, evaluating employee performance including making recommendations regarding pay, performance, and disciplinary action.
- Full management position responsible for managing employees within a department, unit, and/or subdivision. To qualify as full management, a position is responsible for at least one full-time employee in the Workday system, which includes performance management, time off approval, etc. Other responsibilities may include workforce planning, authority for disciplinary action, interviewing, selecting, and training staff, making decisions regarding pay.

### **Additional Requirements:**

Utilize this section of the JRW to provide any additional comments or information that was not covered in the prior sections that you feel are pertinent to the position, such as licensures, accreditations, certifications, specific physical requirements, work environment, effort, skills, etc. Note: This section is critical to the initial JRW creation by a manager and is optional/can be bypassed for the annual process.

Example:

- Must be a Licensed Physician Assistant or Certified Registered Nurse Practitioner
- Frequently required to use personal protective equipment to prevent exposure to hazardous materials
- Physical demands include exerting up to 10 pounds occasionally

## Best Practices:

Things to keep in mind when completing your JRW:

### Do...

- Use this guide as well as other resources for idea generation when writing your JRW
- Use a factual and impersonal style when writing your JRW
- Write clear, concise, and complete sentences
- Begin each task with a present tense action verb
- Focus on key/critical responsibilities critical to the position
- Base the content on the responsibilities and duties of the position
- Use explanatory phrases telling why, how, where, or how often to add meaning and clarity
- Incorporate relevant information such as level of independent judgment, physical and mental effort, contacts, work complexity, equipment, and supervisory responsibilities.
- Generally include 4-6 responsibilities

### Do not...

- Cut and paste information from this guide, job profiles, matrices or any other reference tools
- Use narrative or first person form when writing your JRW
- Use unnecessary words that add fluff to the duty
- Base the content on what the person doing the job can or can't do
- Write the JRW based on the desired classification outcome
- Write the JRW as a procedure manual on how to do the job
- Use a template JRW
- Include minor or occasional tasks

## Additional Resources (Links):

- [Action Words](#)
- [Competencies Overview](#)
- [Non-Management Core Competency Matrix](#)
- [Management Core Competency Matrix](#)

## Instructions for Employees:

You will begin each performance management cycle by meeting with your supervisor to review your job responsibilities and expectations (using the Job Responsibilities Worksheet as a guide). You will also discuss goals for the upcoming performance management cycle. Once you've met with your supervisor, you will use the JRW Application online tool to document your job responsibilities.

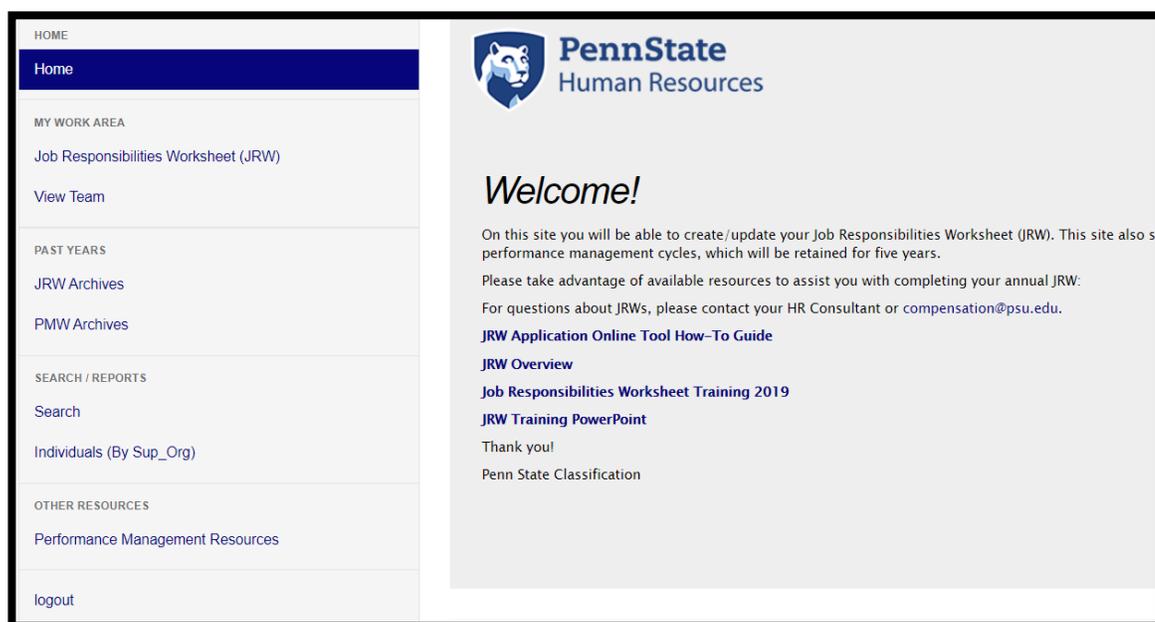
This guide will help you navigate within the JRW Application online tool, step-by-step.

### Logging into the JRW Application online tool:

1. Launch a web browser and navigate to [worklion.psu.edu](http://worklion.psu.edu).
2. You will be prompted to log into WebAccess. After logging in, you will be brought to the WorkLion homepage. The JRW Application online tool can be accessed using the *HR Tools* drop down menu and selecting "**Job Responsibilities Worksheet (JRW).**"
3. Once in the application, your work area, titled *My Work Area*, is located in the gray box on the left side of your screen.

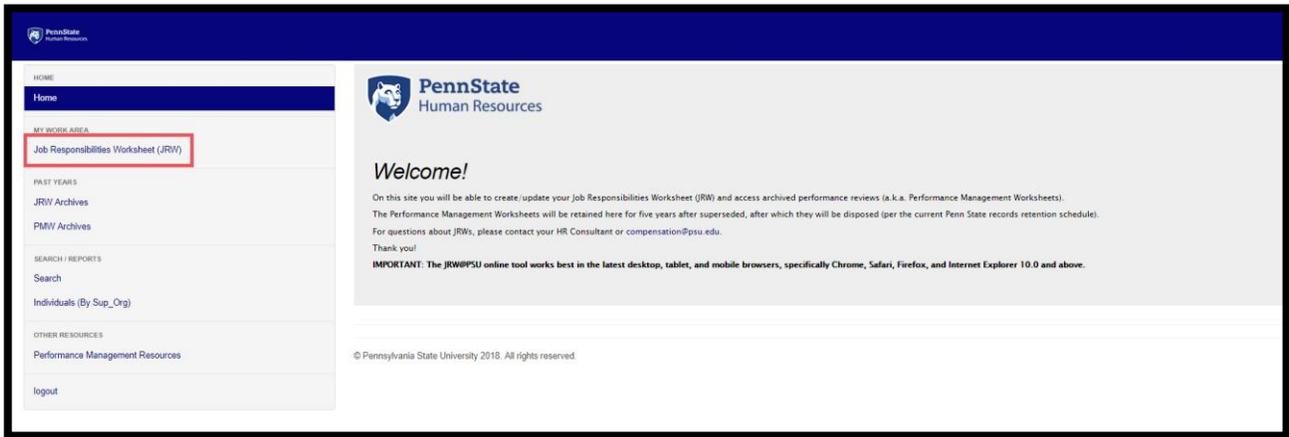
**IMPORTANT:** The JRW Application online tool works best in the latest desktop, tablet, and mobile browsers, specifically Chrome, Safari and Firefox.

If you experience any difficulties with the JRW process or online tool, please contact please contact your HR Consultant or [compensation@psu.edu](mailto:compensation@psu.edu).

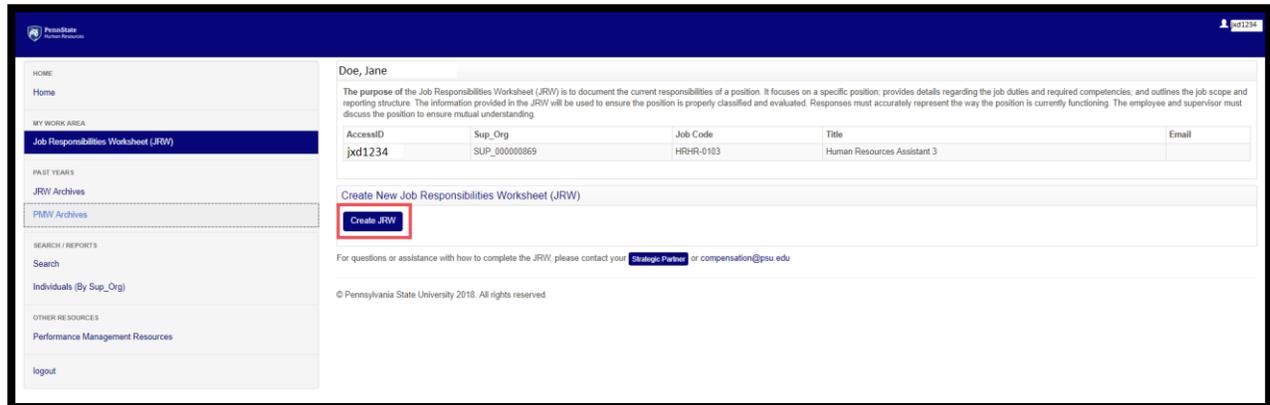


# The Job Responsibilities Worksheet (JRW)

1. Begin by clicking on the “**Job Responsibilities Worksheet (JRW)**” link under *My Work Area* in the menu on the left.



2. Next, you will see the screen below that displays your *Name*, *Supervisory Organization*, *Job Code*, *Title*, and *Email*. To start your JRW for brand new positions, you will click on the blue box labeled “**Create JRW.**”



- You will notice that the JRW status is currently *Incomplete*. If your JRW was already entered into the system and completed during the past review cycle, all components of your JRW will be filled out and are ready for editing.

To view your JRW in its entirety, click on the green **“Show Summary”** button. If you need to make a change after reviewing with your supervisor, click on the component’s **green button** in order to make the change. Remember to click on the **“Save”** button before returning to the JRW dashboard to submit for approval.

Job Responsibilities Worksheet Status **Incomplete - 09/02/20**

Job Responsibilities Worksheet Dashboard

Position Summary	Primary Duties	Position Scope	Competencies Required	Supervisory Responsibilities	Additional Requirements
complete	complete	complete	complete	complete	complete

Once you've spoken to your supervisor about your JRW, complete your JRW here by clicking on the buttons and entering information into each of the six sections above so that each button turns green (complete). When all six buttons are green you can submit your JRW to your supervisor for approval. Once your supervisor reviews and approves your JRW, the status will change to "Approved".

Submit Job Responsibilities Worksheet For Approval

**Notes:** Any notes to submit with approval request

**Remote:**  This position primarily works remotely, in accordance with HRG02 Alternate Work Arrangements

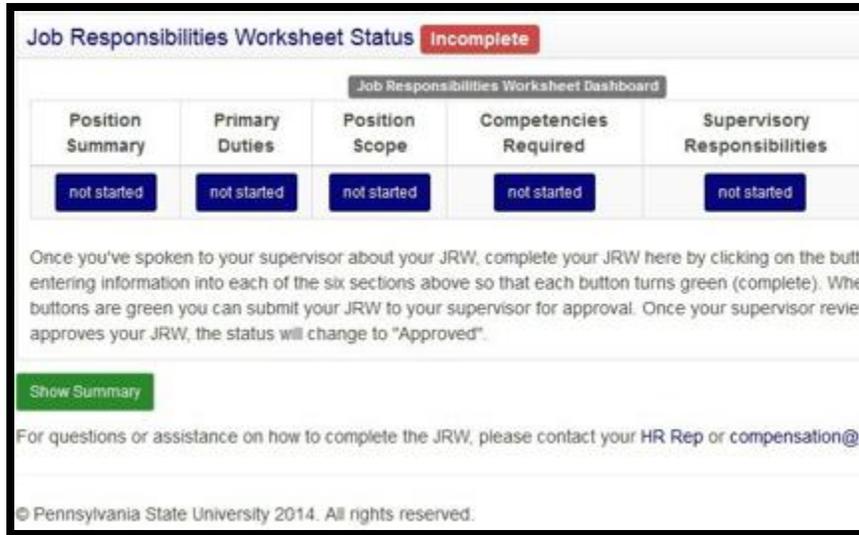
**Submit JRW For Approval**

**Show Summary**

## Completing Your JRW

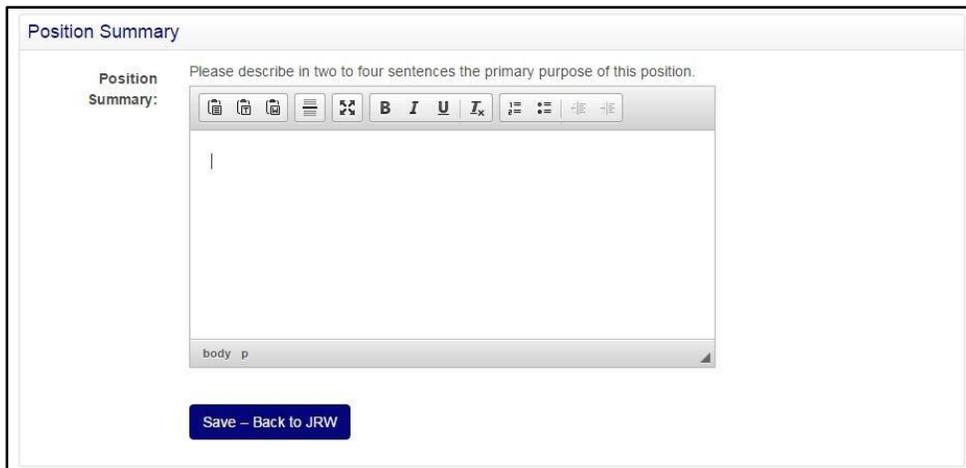
If a JRW does not exist for your position, you will need to complete one. If you are in the first year of your position, a pdf copy of a completed JRW should be provided to you from your supervisor. A JRW is required as part of the process to post a job and should already be completed.

1. Begin by clicking on any of the blue buttons labeled “**Not Started**” under the section titles: *Position Summary, Primary Duties, Position Scope, Competencies Required, Supervisory Responsibilities, and Additional Requirements.*



The screenshot shows the 'Job Responsibilities Worksheet Status' dashboard. At the top, the status is 'Incomplete' in a red box. Below this is a 'Job Responsibilities Worksheet Dashboard' with five columns: 'Position Summary', 'Primary Duties', 'Position Scope', 'Competencies Required', and 'Supervisory Responsibilities'. Each column has a blue button labeled 'not started'. Below the dashboard, there is a paragraph of instructions: 'Once you've spoken to your supervisor about your JRW, complete your JRW here by clicking on the buttons and entering information into each of the six sections above so that each button turns green (complete). When all buttons are green you can submit your JRW to your supervisor for approval. Once your supervisor reviews and approves your JRW, the status will change to "Approved".' There is a green 'Show Summary' button and a footer that reads '© Pennsylvania State University 2014. All rights reserved.'

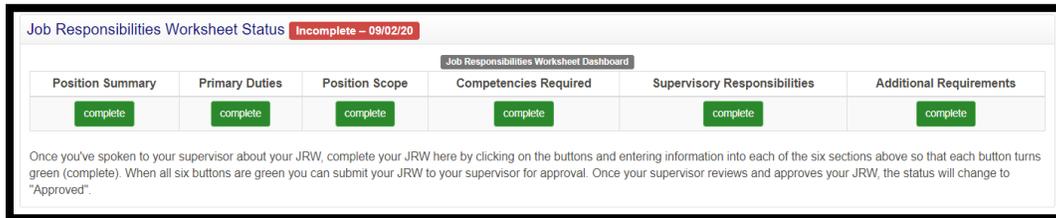
2. Read the instructions found in each section then click inside the text area that you would like to edit and begin typing.



The screenshot shows the 'Position Summary' section. It has a title 'Position Summary' and a sub-label 'Position Summary:'. The main text area contains the instruction: 'Please describe in two to four sentences the primary purpose of this position.' Below the instruction is a rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, and unlink. The text area is currently empty with a vertical cursor. At the bottom of the section is a blue button labeled 'Save - Back to JRW'.

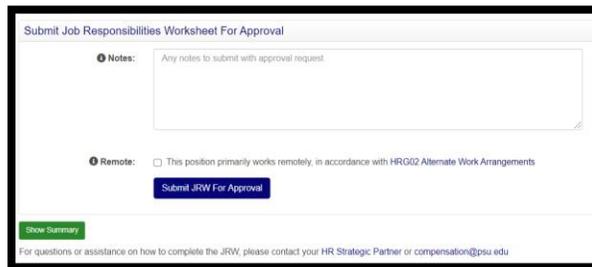
- When satisfied with each entry, click the **“Save - Back to JRW”** button at the bottom of each section. If you have not completed the entire section, the button of the section you have started will turn yellow and be labeled as *Incomplete*. Once you’ve completed the section, the button will turn green and be labeled as *Complete*. NOTE: The Competencies Required and Additional Requirements sections are optional. To bypass these sections simply select the section and click **“Save - Back to JRW”**.

**IMPORTANT:** Never use the back button within your browser. To return to the JRW dashboard always use the **“Save - Back to JRW”** button.



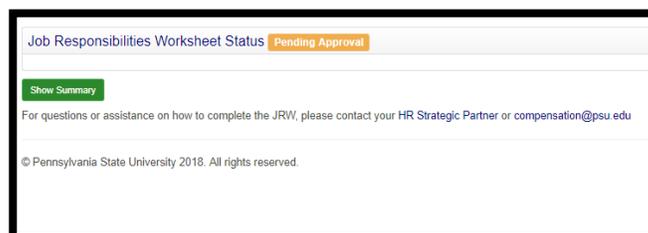
## Submitting Your JRW for Approval

Your JRW will be ready to submit for approval once all the sections are green and labeled as *Complete*. Submit your JRW by clicking on the **“Submit JRW For Approval”** button; you may enter a note to your supervisor in the box provided to accompany your request for approval.



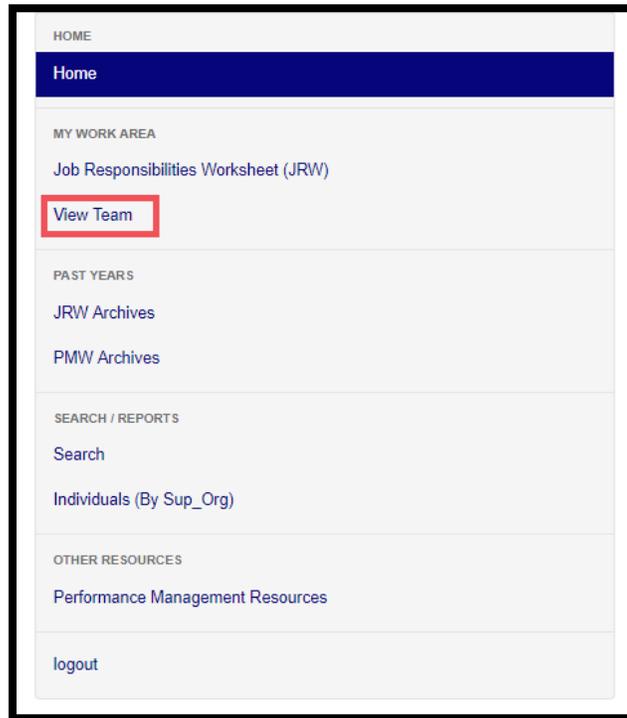
Once your JRW has been submitted for approval, its status will change to *Pending Approval*. In this status, you will not be able to make edits to your JRW because it is awaiting your supervisor’s approval.

Once your JRW is approved, the status will change to *Complete* and will be locked. If you need to make changes to your JRW once it is complete, ask your supervisor to re-open it.



## Instructions for Supervisors:

As a supervisor, you are responsible for supporting your employee's performance which includes reviewing and approving the Job Responsibilities Worksheet (JRW). To begin, you will sign into the JRW Application online tool by navigating to the WorkLion portal and locating the *HR Tools* dropdown menu near the top of the page. Click on "**Job Responsibilities Worksheet (JRW)**" link to access the site. Once accessed, you will be brought to your home page. Here you will find your own JRW information (if you are a full-time staff employee); you will also find each of your full-time staff employee's information by clicking the "**View Team**" link.



The Team Table is used to display your direct reports in an organized fashion. Here you can monitor your employee's progress throughout the JRW process. This table displays their role as a *Supervisor* (if applicable), *Employee Name*, *Title*, and *JRW Status*.

Supervisor	Current Employee	Title	JRW Status
Employees			
Employees of - Williams, Mark			
	Martin, Mary	Human Resources Assistant 3	Completed
	Doe, John	Human Resources Assistant 3	In Progress
	Smith, Charles	Human Resources Assistant 2	Completed
	Jensen, Sue	Human Resources Assistant 2	Completed
	White, Aaron	Human Resources Assistant 3	Completed
	Doe, Jane	Human Resources Assistant 3	Pending Approval

## Reviewing and Approving a JRW

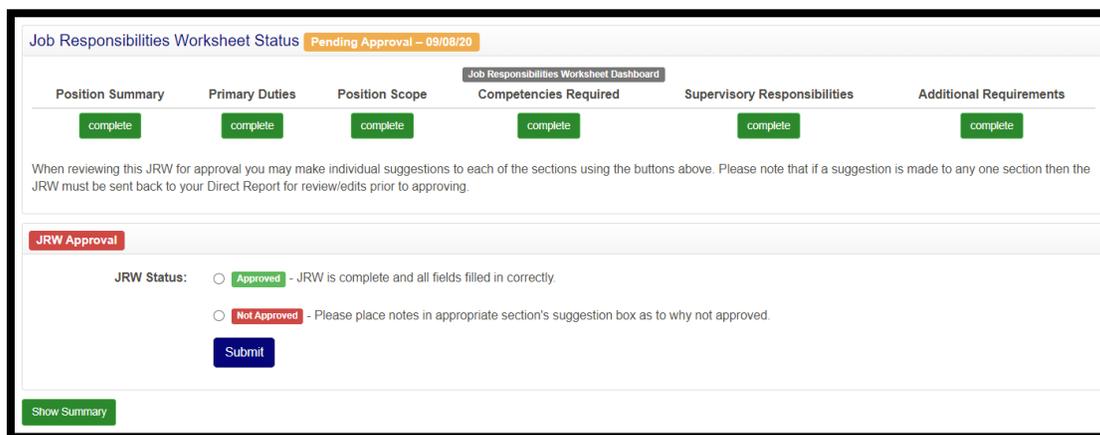
As a supervisor you may go into the various sections of the JRW and provide suggestions for an employee. Note, however, that only an employee can make edits to the JRW.

1. Begin by clicking on the “**View Team**” link from the menu on the left side of your home screen. This will bring up a list of your direct reports (as seen above).
2. From there, select the JRW that you would like to review listed next to the employee’s name. If there is an available JRW to be reviewed, the JRW Status will display *Pending Approval*. Click this button to review the submitted JRW.



Supervisor	Current Employee	Title	JRW Status
Employees			
Employees of – Williams, Mark			
	Martin, Mary	Human Resources Assistant 3	Completed
	Doe, John	Human Resources Assistant 3	In Progress
	Smith, Charles	Human Resources Assistant 2	Completed
	Jensen, Sue	Human Resources Assistant 2	Completed
	White, Aaron	Human Resources Assistant 3	Completed
	Doe, Jane	Human Resources Assistant 3	Pending Approval

3. After clicking the “**Pending Approval**” button, you will be taken to a screen that will display the completed sections of your employee’s JRW. To view the JRW in its entirety, click on the green “**Show Summary**” button.



Job Responsibilities Worksheet Status Pending Approval – 09/08/20

Job Responsibilities Worksheet Dashboard

Position Summary	Primary Duties	Position Scope	Competencies Required	Supervisory Responsibilities	Additional Requirements
complete	complete	complete	complete	complete	complete

When reviewing this JRW for approval you may make individual suggestions to each of the sections using the buttons above. Please note that if a suggestion is made to any one section then the JRW must be sent back to your Direct Report for review/edits prior to approving.

**JRW Approval**

JRW Status:  **Approved** - JRW is complete and all fields filled in correctly.  
 **Not Approved** - Please place notes in appropriate section's suggestion box as to why not approved.

4. Clicking the green “**Complete**” button under any of the sections will allow you to review the contents of that section. Here you are able to enter any suggested text or edits to each section. If you enter any comments into the text field in these areas, be sure to click “**Save – Back to JRW.**”

**IMPORTANT:** If you place any comments into the suggested text or edits box, you will not be able to approve the JRW. Your employee will need to make a change and resubmit.

disciplinary action, etc. (typically assigned to a Manager profile).

# of direct reports:   
(Staff/Technical Services employees only)

Additional Notes:

Suggested Text or Edits: 

Rich text editor toolbar: Undo, Redo, Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent.

- When you have fully reviewed the JRW, click the bubble next to either *Approved* (if all fields are complete and correct) or *Not Approved* (if you have provided your employee with suggested edits for any of the JRW components) then, click “**Submit.**” The application will automatically notify your employee of your response via email.

**JRW Approval**

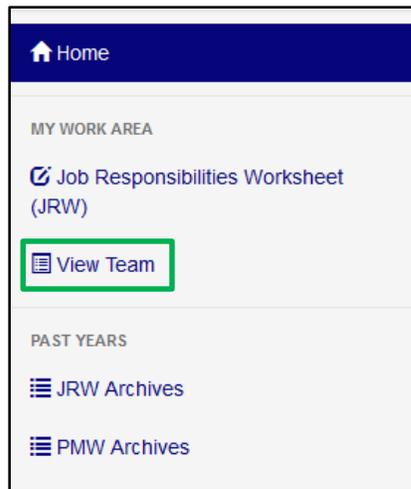
JRW Status:  **Approved** - JRW is complete and all fields filled in correctly.

**Not Approved** - Please place notes in appropriate section's suggestion box as to why not approved.

- Note, if approved, the employee’s JRW status will turn to *Complete* in the *View Team* menu.

## Opening a JRW for Your Employee to Modify

1. Click on “**View Team**” on the left side of your screen.



2. Find the name of the employee that you would like to re-open the JRW for and click the green “**Completed**” button under *JRW Status*.

Supervisory Hierarchy			
Supervisor	Current Employee	Title	JRW Status
Employees			
Employees of - Williams, Mark			
	Martin, Mary	Human Resources Assistant 3	Completed
	Doe, John	Human Resources Assistant 3	In Progress
	Smith, Charles	Human Resources Assistant 2	Completed
	Jensen, Sue	Human Resources Assistant 2	Completed
	White, Aaron	Human Resources Assistant 3	Completed
	Doe, Jane	Human Resources Assistant 3	Completed

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- After clicking the green “**Completed**” button, scroll down on the page and locate the section titled *Open JRW for editing?* Click the bubble to the left of the yellow box labeled “**Open JRW**”, then click “**Submit**.” This will notify the employee that their JRW is open for editing. Remind your employee to re-submit their JRW for approval.

Job Responsibilities Worksheet Status **Completed**

Date Last Approved – 07/21/15 (date updated on each succeeding approval)

This JRW is marked as "completed" for the current JRW period and has been approved by the employee's supervisor.

**Open JRW for editing?**

JRW Status:  **Open JRW** - Open JRW for editing by employee.

**Please Note:** The JRW is now marked as approved and is **NOT** editable by the employee. If changes are desired you can reset the JRW status to "Incomplete" by selecting the button above and pressing "submit". This will put the JRW into an editable status. Once the employee has made the desired changes the JRW will be resubmitted for your approval. Also please note that editing capability is also limited by any calendar based constraints of the JRW application.

**Submit**

- After reopening the JRW, you will receive the message below indicating that the JRW status has been updated from *Complete* to *Incomplete*.

You have successfully updated this JRW status.

Job Responsibilities Worksheet Status **Incomplete**

The JRW you are viewing is currently in a "non viewable" mode as it is presently under construction by the employee currently holding this position. Please check back again later. Thank you!

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