

Job Responsibilities Worksheet



PennState
Human Resources

Instructions

The purpose of this 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 requirements, and outlines the job scope.

The information provided in the JRW correlates to a staff job profile and level, therefore, it is important that the JRW accurately represent the way the position is currently functioning. 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.

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

Additional JRW guidance can be found at <https://hr.psu.edu/compensation-and-classification/job-responsibilities-worksheet>.

Below are some points to consider when completing the JRW:

- Consider the normal day-to-day responsibilities
- Use a factual and impersonal style when writing the JRW
- Begin each task with a present tense action verb
- Base the content on the responsibilities and duties of the position with the focus on essential responsibilities critical to the position
- Use explanatory phrases telling why, how, where, or how often to add meaning and clarity
- When indicating the percentage of time spent on each duty, consider what is performed over a given period of time
- The percentages must total 100% and should not be smaller than 5% or greater than 50%
- Describe the position as it is being performed today and not as it might be in the future (this does not necessarily apply in cases where a JRW is being completed for a vacant or new position)
- Include expectations of a fully proficient incumbent meeting all position requirements

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 the JRW, or specific individual names
- Use unnecessary words that add "fluff" to the duty
- Base the content on what the person doing the job can or can't do
- Include one time, short-term assignments or an exhaustive list of all, minor, or occasional tasks
- Write the JRW based on the desired classification outcome
- Write the JRW as a procedure manual on how to do the position
- Utilize template JRWs when positions have notable differences

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Select One:

- General Update (Vacant Position Review, Annual Review, New/Change in Job Responsibilities)
 Initial Creation (New Hire/New Position)

General Information

Employee Name:

Current Job Title: Level: Salary Band:

Work Unit:

Position Number (if known):

Reporting Structure Information

Immediate Supervisor's Name:

Current Job Title: Level:

Working Title:

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Position Summary

Position Summary: Please describe, in 2-4 sentences, the primary purpose of this position.

Primary Duties

Please list up to ten of the primary duties, based on percentage of time, from most to least. The percentages must total 100% and should not be smaller than 5% or greater than 50%.

1. Description:

New Duty % of Time

2. Description:

New Duty % of Time

3. Description:

New Duty % of Time

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4. Description:

New Duty % of Time

5. Description:

New Duty % of Time

6. Description:

New Duty % of Time

7. Description:

New Duty % of Time

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8. Description:

New Duty % of Time

9. Description:

New Duty % of Time

10. Description:

New Duty % of Time

If there is a specific business title for this role, please include it here:

Scope of Responsibilities

Indicate the scope of this job that relates to the primary duties. Note that University-wide would be the broadest selection. *Select one.*

University

College, Commonwealth campus, administrative/business unit or central support

Department

Function, process, or job-specific within a department

Provide additional information if applicable:

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Supervisory Responsibilities

Indicate the type and scope of supervisory responsibilities that most accurately describe this job. *Select one.*

- Direct Supervisor for Full-Time Employees:** Direct authority to make decisions for full-time employees on the following: employee hiring, disciplinary action, starting salaries and increases; conduct employee performance evaluations. May also supervise wage payroll, student, and/or temporary workers or volunteers
- Indirect Supervisor for Full-Time Employees:** As a technical/functional expert, may serve as a lead over other employees. Responsibilities may include training, directing or assigning work, providing input to direct supervisor on employee hiring, disciplinary action, or employee performance; may include dotted-line reporting relationships.
- Direct Supervisor for Only Wage Payroll, Student, and/or Temporary Workers or Volunteers:** May recommend the following: hiring, disciplinary action, staffing assignments, and scheduling.
- None:** Does not have any supervisory responsibilities.

Number of Employees Supervised: 0 – 2 3 – 6 7 – 9 More than 10

Level of Employees Supervised (*Select all that apply*): Individual Contributor(s) Supervisor(s)

Fiscal Responsibility

Select all that apply to this job's requirements. Please provide additional comments if appropriate

Does this position have budget responsibilities? If yes, check the level of involvement listed below: <input type="checkbox"/> Developing <input type="checkbox"/> Planning/Forecasting <input type="checkbox"/> Approving If yes, include dollar amount:	Yes No <input type="checkbox"/> Monitoring/Tracking <input type="checkbox"/> Validating & Paying Invoices
Please check the box if this position also has budget responsibilities for grants.	
Does position have final signature authority (i.e., ability to sign contracts on behalf of Penn State per policy FN11)? If yes, indicate level: University-wide Department-wide If yes, include dollar amount:	Yes No College-, Commonwealth campus-, unit-wide Function-, process-, or job-specific
Additional comments:	

Problem Solving

Indicate the nature of problems regularly encountered by this job. *Select one.*

- Routine:** Problems encountered are routine, somewhat repetitive, and generally solved by following clear directions and procedures.
- Moderate:** Problems are varied, requiring analysis or interpretation of the situation. Problems are solved using specialized knowledge and skills, and general precedents and practices.
- Complex:** Problems are highly varied, complex and often non-recurring; require novel and creative approaches to resolution. New concepts and approaches may have to be developed.

Provide additional information if appropriate:

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Independence of Action

Indicate the job's general degree of independence of action. *Select one.*

- Work is closely monitored by supervisor:** Detailed instructions and procedures are generally provided.
- Work progress is monitored by supervisor:** Incumbent follows precedents and procedures and may set priorities and organize work within general guidelines established by supervisor.
- Results are defined:** Existing practices are used as guidelines to determine specific work methods; carries out work activities independently; supervisor is available to resolve problems.
- Results are NOT defined:** Incumbent sets own goals and determines how to accomplish results with few or no guidelines to follow, although precedents may exist; supervisor provides broad guidance and overall direction.

Provide additional information if appropriate:

Communication and Collaboration

Select the statement(s) that best describe(s) the type of contacts, interactions, or sharing of information that you have on a regular basis, and/or that are required in your position. *Select all statements that apply.*

- Internal to Working Unit:** Contacts and information sharing are primarily within my working group, department, and/or college/campus/unit.
- Internal to University:** Contacts and information sharing are external to my department and/or college/campus/unit, but internal to the University (i.e., other colleges/campuses/units, central administration/services such as Human Resources, Payroll, Finance, Information Technology, etc.).
- External to University for Scheduling/Coordination:** Contacts and information sharing are external to the University for the primary reason of scheduling, coordinating services, etc.
- External to University for Business Purposes:** Contacts and information sharing are external to the University for the primary reason of conducting business relevant to the scope of my position (i.e., outreach, engaging external organizations, compliance, etc.)

For Manager's Completion Only

Education Requirements

Indicate the level of education required and preferred for this position. *Please select one option for Required and one option for Preferred, if appropriate.*

Required	Preferred	Level of Education	Field of Study (if applicable)
<input type="radio"/>	<input type="radio"/>	High school diploma or GED	
<input type="radio"/>	<input type="radio"/>	Vocational or technical training or degree	
<input type="radio"/>	<input type="radio"/>	Associate's degree	
<input type="radio"/>	<input type="radio"/>	Bachelor's degree	
<input type="radio"/>	<input type="radio"/>	Master's degree	
<input type="radio"/>	<input type="radio"/>	Doctoral degree	
<input type="radio"/>	<input type="radio"/>	Not Applicable	

Please check the box if relevant experience may substitute for some or all of the education above.

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Other Requirements

Indicate certifications and licensures required and/or preferred for this position.

Required	Preferred

Work Experience

Indicate the level of experience required and preferred for this position. *Please select one option for Required and one option for Preferred, if appropriate.*

Required	Preferred	Level of Experience
<input type="radio"/>	<input type="radio"/>	Entry level position, no prior work experience required
<input type="radio"/>	<input type="radio"/>	1 – 3 years
<input type="radio"/>	<input type="radio"/>	4 – 7 years
<input type="radio"/>	<input type="radio"/>	8 – 10 years
<input type="radio"/>	<input type="radio"/>	More than 10 more years
<input type="radio"/>	<input type="radio"/>	Not Applicable

Type/Field of Experience:

Signatures

By signing below or typing my name below and sending this form via email, I am confirming that the information provided is accurate to the best of my knowledge.

Employee's Name or Signature (if applicable):

Date:

Immediate Supervisor: By signing below or typing my name below and sending this form via email, I am confirming that I have reviewed the information provided and agree that it accurately reflects the content of the position

Immediate Supervisor's Name or Signature:

Date: