



PennState

Human Resources

How to update your JRW in the online tool

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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 online tool to document your job responsibilities.

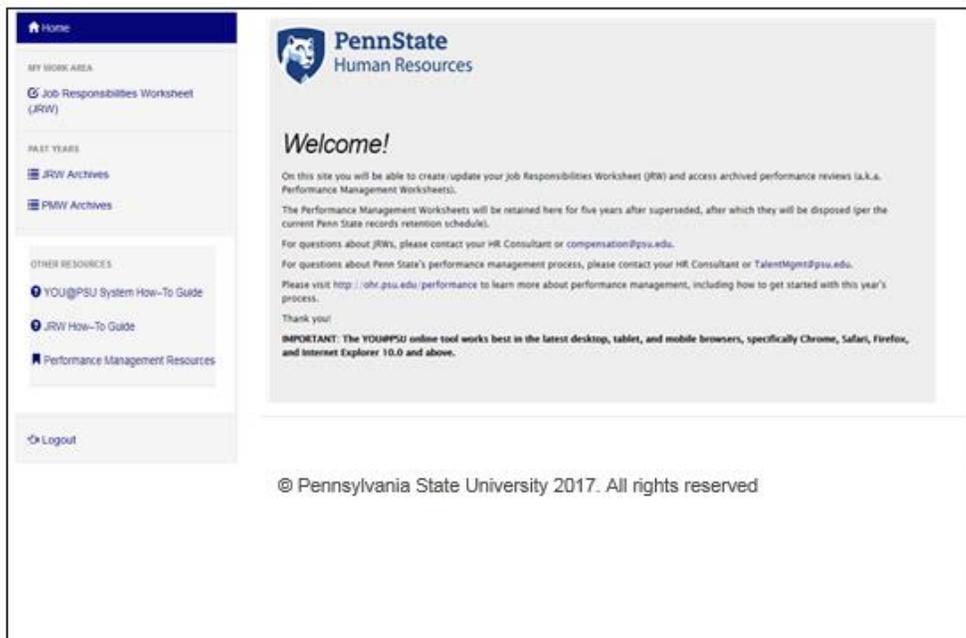
This guide will help you navigate the JRW documentation process, step-by-step. For more information about the JRW, please visit ohr.psu.edu/compensation-and-classification/job-responsibilities-worksheet

Logging into the online tool:

1. Launch a web browser and navigate to you.psu.edu.
2. You will be prompted to log into WebAccess. After logging in, you will be brought to the home screen of the online tool; your work area is located in the gray box on the left side of your screen.

IMPORTANT: This online tool works best in the latest desktop, tablet, and mobile browsers, specifically Chrome, Safari and Firefox (Internet Explorer 10.0 and above will work, if necessary, but not ideal).

If you experience any difficulties with updating your JRW, please contact compensation@psu.edu for assistance.



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. This will take you to a screen that displays your name, Access ID, HR Admin area, job code, title, and email address.
2. Next, enter your **Supervisor’s Access ID** (i.e. the first part of their Penn State email address) in the box provided in the **Access/Create Job Responsibilities Worksheet** area. Once you’ve entered your supervisor’s Access ID, click on the blue “**Access/Create JRW**” button and you will be taken to your Job Responsibilities Worksheet (JRW) dashboard.

JOHNSON, JOSEPH

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 job duties and required competencies; and outlines the job scope and reporting structure. The information provided in the JRW will be used to ensure the position is properly classified and evaluated. Responses must accurately represent the way the position is currently functioning. The employee and supervisor must discuss the position to ensure mutual understanding.

AccessID	HR Admin Area	Job Code	Title	Email
	290 – (OFFICE OF HUMAN RESOURCES)	EDDD0204	ED PROGRAM ASSOC 4	jxj999@psu.edu

Create Job Responsibilities Worksheet

Supervisor AccessID: Be sure to enter your supervisor's correct AccessID (i.e. the letters & numbers that make up their Penn State email address before @psu.edu). If you are starting a new year for an existing JRW please note that this is just a confirmation of your existing information.

[Create JRW](#)

IMPORTANT! Getting the supervisor's information in correctly is very important for the You@PSU technology to function correctly. If your current supervisor is not your "usual" supervisor (e.g. the position is currently unfilled, or someone else is filling in for your supervisor at the moment) or you are unsure of who your supervisor is please contact your HR Rep at the following link so that they can assist you. [Email HR Rep](#)

For questions or assistance with how to complete the JRW, please contact your [HR Rep](#) or compensation@psu.edu

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Please Note: The You@PSU technology is comprised of two parts – the Job Responsibilities Worksheet (JRW) and the Performance Management worksheet (PMW). The PMW will not be visible in your personal work area until your JRW is created and approved by your supervisor.

2. If your JRW was already entered into the system and approved during a past review cycle, all components of your JRW will be complete.

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**

Job Responsibilities Worksheet Dashboard

Position Summary	Primary Duties	Position Scope	Competencies Required	Supervisory Responsibilities	Unit Peers
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

Submit JRW For Approval

Show Summary

IMPORTANT: If your position has recently changed and you would like the JRW information from your previous position to be used for your new JRW, please click on the “**Copy as New JRW**” button.

Copy An Existing Job Responsibilities Worksheet (JRW)

IMPORTANT! If you believe you already have a JRW for your current position and the job information matches what shows below then you can copy your existing (old) JRW by entering your current supervisor below. Do not do this if you have moved to a new position as your JRW will be different!

JRW Job Title:

JRW Job Code:

JRW Approval Date:

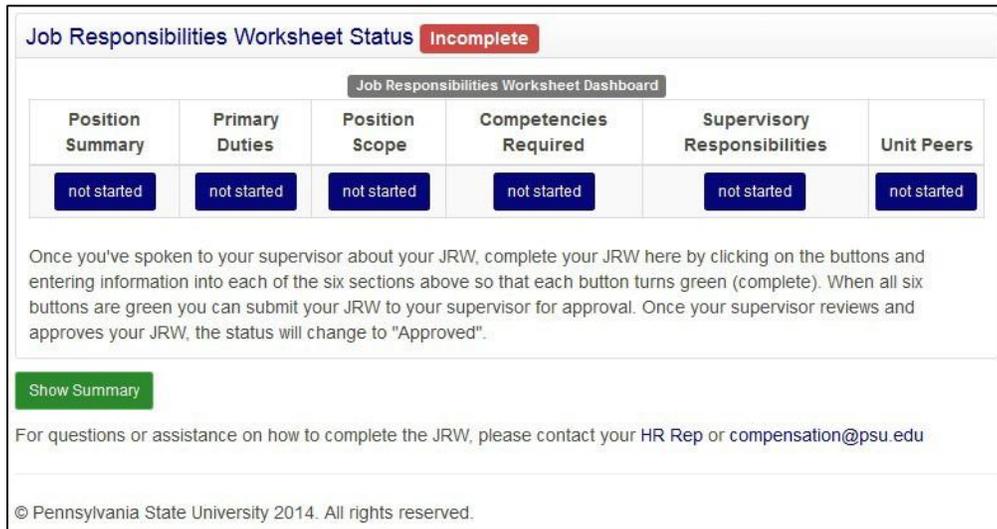
Supervisor AccessID: Be sure to enter your supervisor's correct AccessID (i.e. the letters & numbers that make up their Penn State email address before @psu.edu). If you are starting a new year for an existing JRW please note that this is just a confirmation of your existing information.

Copy As New JRW

Creating a New JRW

If a JRW does not exist for your position, you will need to create one.

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 Unit Peers.**



Job Responsibilities Worksheet Status Incomplete

Job Responsibilities Worksheet Dashboard

Position Summary	Primary Duties	Position Scope	Competencies Required	Supervisory Responsibilities	Unit Peers
not started	not started	not started	not started	not started	not started

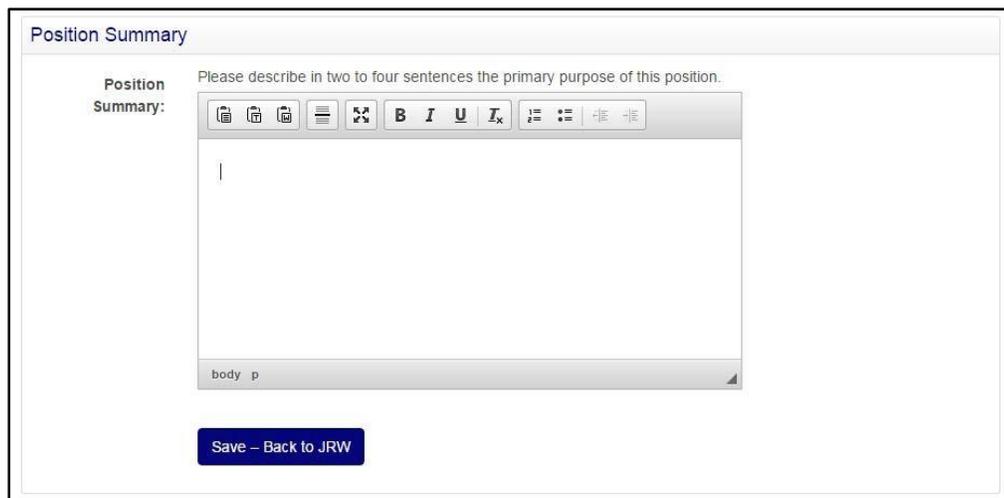
Once you've spoken to your supervisor about your JRW, complete your JRW here by clicking on the buttons and entering information into each of the six sections above so that each button turns green (complete). When all six buttons are green you can submit your JRW to your supervisor for approval. Once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

Show Summary

For questions or assistance on how to complete the JRW, please contact your HR Rep or compensation@psu.edu

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



Position Summary

Position Summary: Please describe in two to four sentences the primary purpose of this position.

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, and help.

body p

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.”**

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

Job Responsibilities Worksheet Status Incomplete					
Job Responsibilities Worksheet Dashboard					
Position Summary	Primary Duties	Position Scope	Competencies Required	Supervisory Responsibilities	Unit Peers
complete	incomplete	not started	not started	not started	not started

Submitting Your JRW for Approval

Your JRW will be ready to submit for approval once all of 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.

Job Responsibilities Worksheet Status Incomplete					
Job Responsibilities Worksheet Dashboard					
Position Summary	Primary Duties	Position Scope	Competencies Required	Supervisory Responsibilities	Unit Peers
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:

Submit JRW For Approval

Show Summary

For questions or assistance on how to complete the JRW, please contact your HR Rep or compensation@psu.edu

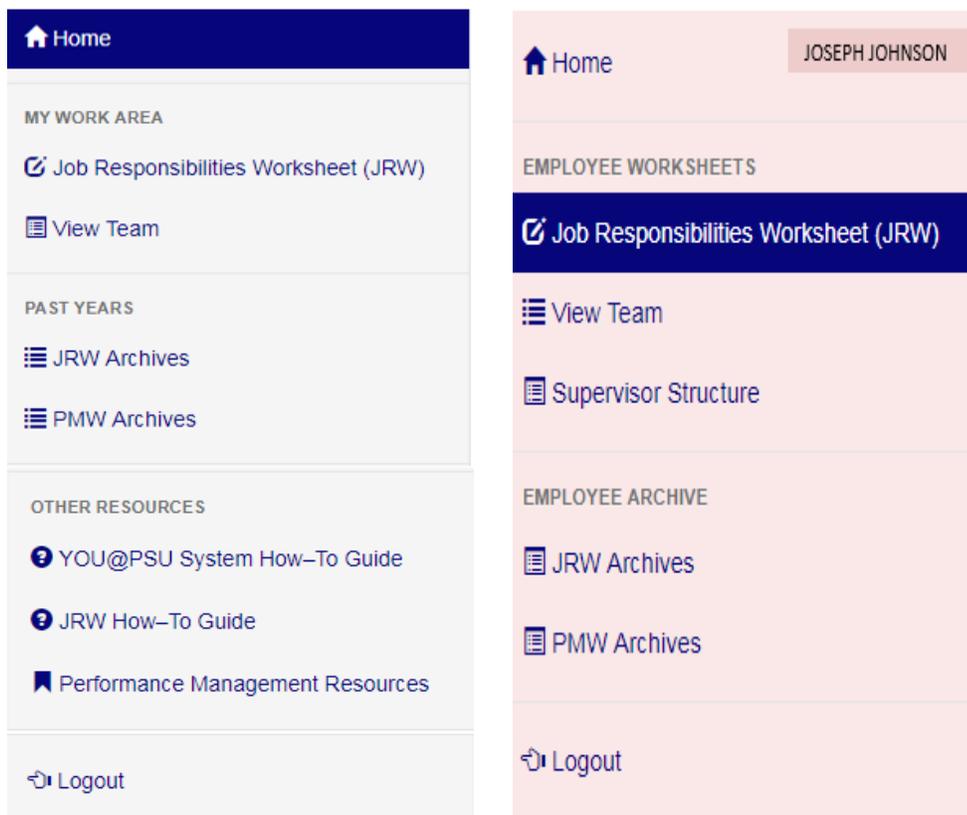
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Once your JRW has been submitted for approval, its status will change to **“Pending Approval.”** In this status, you will not be able to make edits to your JRW because it is awaiting your supervisor’s approval.

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)**. When working in your own space in the online tool, you will notice that the menu will be gray and will be labeled "My Work Area." When you are working in an employee's workspace, the menu will be pink and display the employee's name in the top right corner.



Logging into the online tool:

1. Launch a web browser and navigate to you.psu.edu.
2. You will be prompted to log into WebAccess. After logging in, you will be brought to the home screen of the online tool; your work area is located in the gray box on the left side of your screen.

Here you will find your own JRW and archived performance reviews (PMWs) if you are a full-time staff employee; you will also find each of your employee's information by clicking the "View Team" link.

IMPORTANT: The first time you sign into the YOU@PSU online tool during a new performance management cycle, you will be asked to enter your own supervisor’s Access ID. Your team table will not appear until you do so.

Important

Faculty/Administrators/Executives: Please enter your supervisor's access ID to help us complete the hierarchy table for your college/unit. By doing so, you are giving your leader the ability to view every staff member's YOU@PSU record, regardless of their supervisor's role.

Thank you for your cooperation.

Supervisor AccessID: Be sure to enter your supervisor's correct AccessID (i.e. the letters & numbers that make up their Penn State email address before @psu.edu)

[Submit](#)

For questions or assistance with how to complete this information, please contact your [HR Rep](#)

The Team Table is used to display your direct reports in an organized fashion. This table displays their role as a Supervisor (if applicable), Employee Name, Title, and the status of the JRW.

Supervisory Hierarchy				
Supervisor	Current Employee	Title	JRW Status	
Direct Reports				
	JOHNSON, JOSEPH	ED PROGRAM ASST 3	In Progress	

* Positions where the permanent supervisory position may currently be empty (non-filled positions) may show an interim supervisor. Once the supervisory position is filled this person's JRW will disappear from this list and move to the proper long-term supervisor's list.

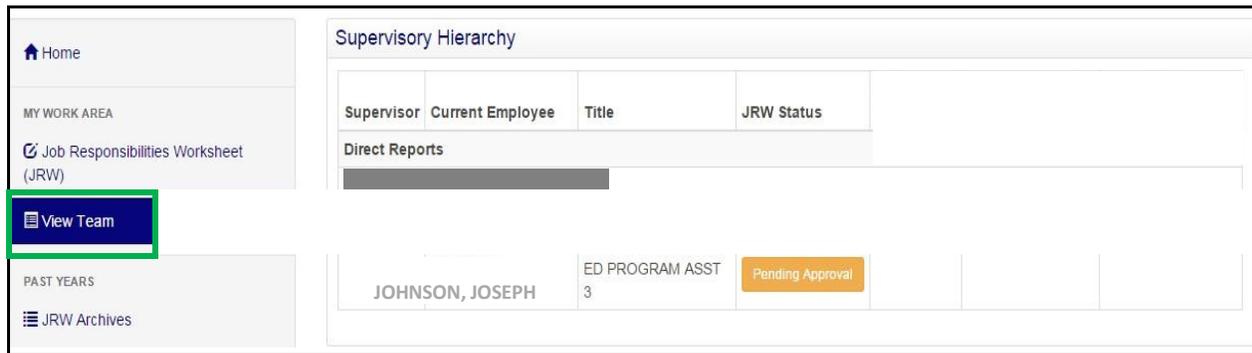
Please note that the time period status changes (mid year check-in and End of Year review) have no affect if the Direct Report's PMW is not yet created. For these time period check-in dates to function the Direct Report must have started their PMW.

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Reviewing and Approving a JRW

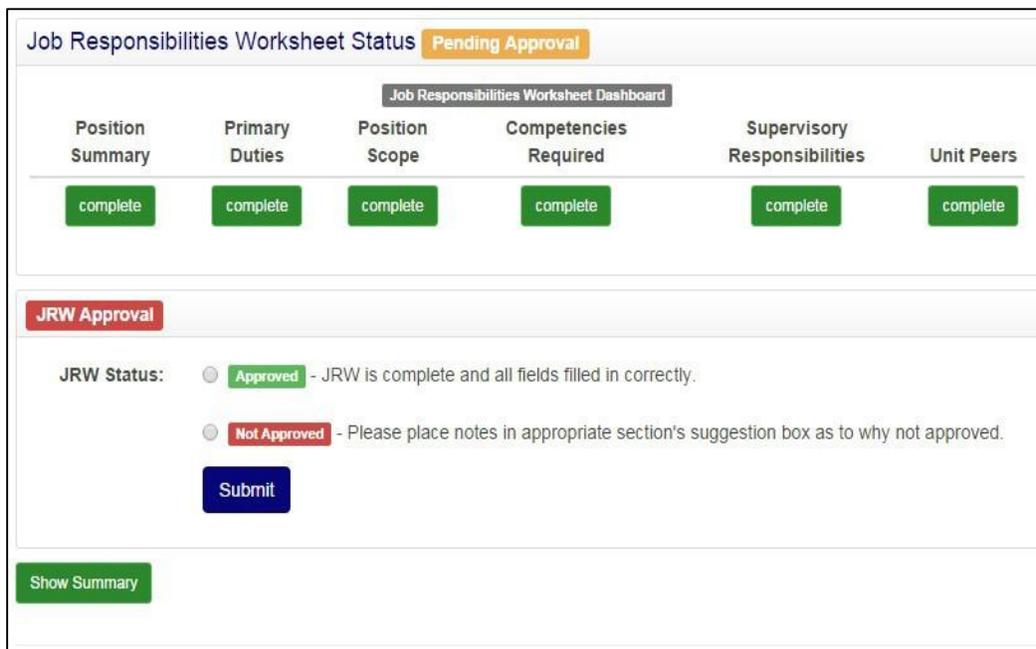
As a supervisor you may go into the various sections of the JRW and provide suggestions for edits; however, only an employee can make edits to the JRW.

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.
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** button will display **"Pending Approval."** Click this button to review the submitted JRW.



The screenshot shows a web interface with a left-hand navigation menu and a main content area. The navigation menu includes 'Home', 'MY WORK AREA', 'Job Responsibilities Worksheet (JRW)', 'View Team' (highlighted with a green box), and 'PAST YEARS' with 'JRW Archives'. The main content area is titled 'Supervisory Hierarchy' and contains a table with columns for 'Supervisor', 'Current Employee', 'Title', and 'JRW Status'. Under the 'Direct Reports' section, there is one entry for 'JOHNSON, JOSEPH' with a title of 'ED PROGRAM ASST' and a 'JRW Status' of '3' and a 'Pending Approval' button.

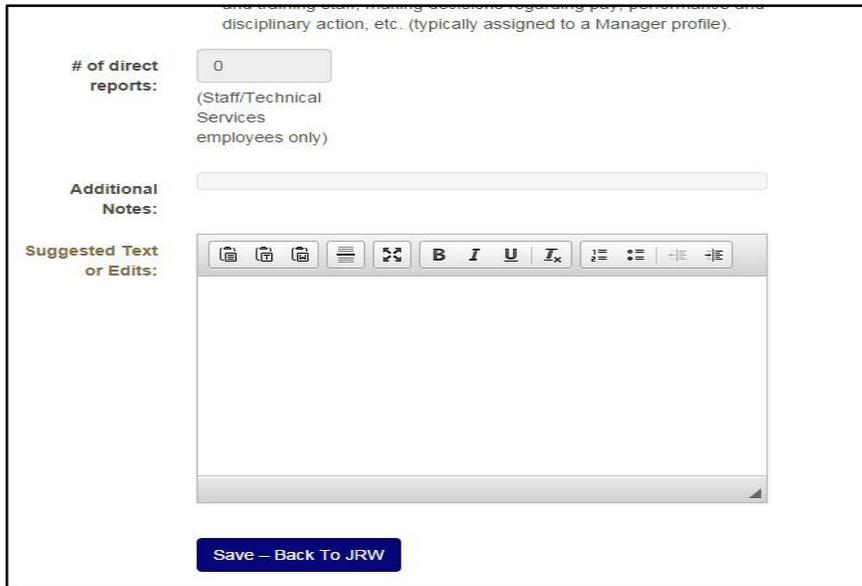
3. After clicking the **"Pending Approval"** button, you will be taken to a screen that will display the completed sections of your employee's JRW. To view the JRW in its entirety, click on the green **"Show Summary"** button.



The screenshot shows the 'Job Responsibilities Worksheet Status' page. At the top, it says 'Job Responsibilities Worksheet Status Pending Approval'. Below this is a 'Job Responsibilities Worksheet Dashboard' with six sections: 'Position Summary', 'Primary Duties', 'Position Scope', 'Competencies Required', 'Supervisory Responsibilities', and 'Unit Peers'. Each section has a green 'complete' button. Below the dashboard is a 'JRW Approval' section with two radio buttons: 'Approved - JRW is complete and all fields filled in correctly.' and 'Not Approved - Please place notes in appropriate section's suggestion box as to why not approved.' There is a 'Submit' button and a green 'Show Summary' button at the bottom.

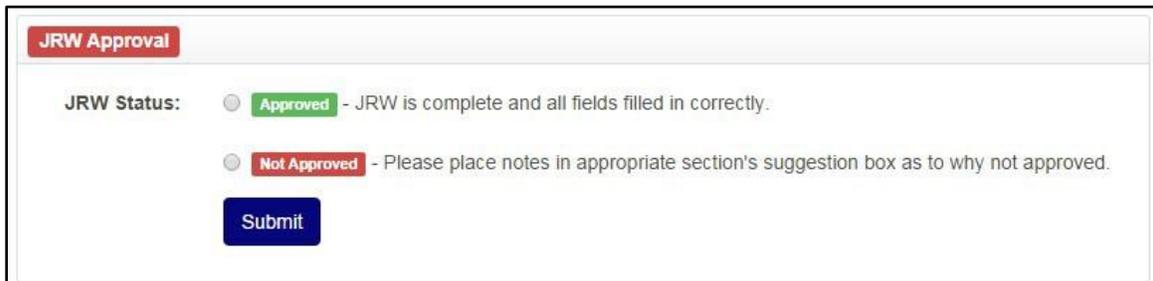
- Clicking the green “**complete**” button under any of the sections will allow you to review the contents of that section. Here you are able to enter any suggested text or edits to each section. If you enter any comments into the text field in these areas, be sure to click “**Save – Back to JRW.**”

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.



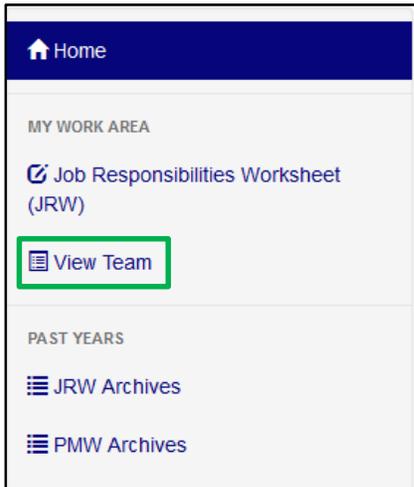
The screenshot shows a portion of a web form. At the top, there is a text label: "and training staff, making decisions regarding pay, performance and disciplinary action, etc. (typically assigned to a Manager profile)." Below this, there is a field for "# of direct reports:" with the value "0" and a sub-label "(Staff/Technical Services employees only)". Below that is an "Additional Notes:" text area. The main section is "Suggested Text or Edits:" which features a rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, and unlink. Below the toolbar is a large empty text area. At the bottom of the form is a blue button labeled "Save – Back To JRW".

- 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 system will notify your employee of your response.



The screenshot shows the "JRW Approval" section of the form. It has a red header with the text "JRW Approval". Below the header, there is a "JRW Status:" label followed by two radio button options. The first option is "Approved" with a green bubble and the text "- JRW is complete and all fields filled in correctly." The second option is "Not Approved" with a red bubble and the text "- Please place notes in appropriate section's suggestion box as to why not approved." Below these options is a blue "Submit" button.

Opening a JRW for Your Employee to Modify



1. Log in to the online tool: : you.psu.edu
2. Click on “**View Team**” on the left side of your screen.
3. Find the name of the employee that you would like to re-open the JRW for and click the green “**Completed**” button under **JRW**.

The screenshot shows a table titled 'Supervisory Hierarchy'. The table has four columns: 'Supervisor', 'Current Employee', 'Title', and 'JRW Status'. Below the table, there is a section for 'Direct Reports' with a sub-section for 'Direct Reports of - WILLIAMS, TIMMOTHY'. A row in the table shows 'JOHNSON, JOSEPH' as the current employee, 'INSTRUCTIONAL DESIGNER 2' as the title, and a green 'Completed' button in the 'JRW Status' column.

Supervisor	Current Employee	Title	JRW Status
	JOHNSON, JOSEPH	INSTRUCTIONAL DESIGNER 2	Completed

- 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