

# Job Responsibilities Worksheet (JRW)



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# Agenda

- Introduction
- The JRW Application
- Completing the JRW
- Best Practices
- Live Demo (Supervisor and Employee Roles)

# Introduction



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# Job Responsibilities Worksheet (JRW)

- The purpose of the JRW is to document the current responsibilities of a position
- It focuses on a specific position, provides details regarding the primary position duties and outlines the position scope
- 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

# Why Accurate Job Information Is Important

## Recruiting and Promotion

Facilitates development of job postings that accurately reflect a positions' major responsibilities, helps identify the most qualified candidates, and provides new incumbents with a clear understanding of the position.

## Classification Review

Is a source to evaluate the duties, requirements, scope, complexity, etc. of a position and determine the job profile that most appropriately matches the position specifications.

## Performance Discussions

Promotes a clear, shared understanding of a position's major responsibilities and clarity in expectations and performance standards.

## Pay Benchmarking

Is the primary source of information to ensure appropriate external market comparisons to determine the competitiveness of pay.

## Pay Opportunity

Helps determine appropriate and competitive pay opportunity for incumbents doing the work.

## Compliance

Helps ensure compliance with relevant legislation such as the Americans with Disabilities Act (ADA), Equal Employment Opportunity and Affirmative Action (EEO/AA) and Fair Labor Standards Act (FLSA).

## Internal Equity

Provides information that allows for internal comparisons of responsibilities, skills, and knowledge of similar roles.



# Changes in the Job Responsibilities Worksheet (JRW)



Is easy for non-HR professionals to complete and for HR to validate.

Is not highly dependent on individual writing styles.



Collects the same type of information for all jobs in a clear, consistent format.



# Key Changes

Removed	Updated	Added
Competencies Required	Scope of Responsibilities	Fiscal Responsibilities
	Supervisory Responsibilities	Problem Solving
		Independence of Action
		Communication and Collaboration
		Education Requirements (Supervisors only)
		Other Requirements (Supervisors only)
		Work Experience (Supervisors only)

# JRW Update Process for 2021

## Staff

May 7, 2021

Access JRW application and review current information

Update information as needed and complete new JRW sections

Submit updated JRW for Supervisor review

## Supervisors

May 21, 2021

Review employee input in JRW and provide comments for revisions as needed

Complete new JRW sections for supervisors

Submit accurate and updated JRW for HR review

## HR

June / July 2021

Review and finalize JRWs, including discussions with supervisors as needed



# The JRW Application



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# JRW Application

- The JRW Application can be accessed under the **HR Tools** drop down menu
- The Application houses all position JRWs for up to five years
- Employees can access their position's JRW
- Supervisors can also view their direct reports' JRW

- Electronic Job Management System (EJMS)
- Employment Verification (The Work Number)
- Penn State Policies
- Historical Payroll
- Job Responsibilities Worksheet (JRW)
- Learning Resource Network (LRN)
- Penn State Jobs
- Sedgwick Claim Capture (Workers' Comp Claims)
- Staff Job Profiles
- Technical Service Job Descriptions
- Workday
- Request Staff Job Review

Search

... HR services, payroll, attendance, and more.

... answers you need.

### NEWS AND ANNOUNCEMENTS

Check back for important news and information

### MY INFORMATION

View/update your information, including time, benefits, and pay

### NEW EMPLOYEES

Resources for the first months of employment



# WorkLion Portal



HOME

Home

MY WORK AREA

[Job Responsibilities Worksheet \(JRW\)](#)

[View Team](#)

PAST YEARS

[JRW Archives](#)

[PMW Archives](#)

OTHER RESOURCES

[Performance Management Resources](#)

[logout](#)



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## *Welcome!*

On this site you will be able to create/update your Job Responsibilities Worksheet (JRW). This site also stores archived Performance Management Worksheets (PMW) from the 2015-2017 performance management cycles, which will be retained for five years.

Please take advantage of available resources to assist you with completing your annual JRW:

**[Job Responsibilities Worksheet Training 2020](#)**

**[JRW Training PowerPoint](#)**

For questions about JRWs, please contact your HR Consultant or [compensation@psu.edu](mailto:compensation@psu.edu).

Thank you!

Penn State Classification

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# JRW Application



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# Completing the JRW



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# Sections of the JRW

Eight main sections:

- Position Summary
- Primary Duties
- Scope of Responsibilities - UPDATED
- Supervisory Responsibilities - UPDATED
- Fiscal Responsibility - NEW
- Problem Solving - NEW
- Independence of Action - NEW
- Communication and Collaboration - NEW

This year only, supervisors will also complete information on:

- Education Requirements - NEW
- Other Requirements - NEW
- Work Experience - NEW

# 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.
- Sometimes this is easier to draft after you've finished the rest of the JRW.

## Example:

*“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. This position will also coordinate the World Campus Alumni Ambassador Program.”*

# 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.
- Write statements so that someone unfamiliar with the position can understand what the position does.
- When indicating the percentage of time spent on each duty, consider what is performed over a given period of time. Focus on duties that take at least 10% 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).

**\*This section is the most important aspect of the JRW\***

# Describing Primary Duties Clearly

Use the following pattern to write a primary responsibility statement:

Action Word

+

Subject

+

Activities

*For example:*

Action Word



Subject



Reviews and validates transactions by ensuring completeness and accuracy of the account balances.

Activities



# Action Words

## Commonly Used Action Verbs for Profiles

Accept	To receive; to regard as true, proper, normal, inevitable
Accomplish	To execute fully; to attain
Adjust	To make slight changes in something to make it fit or function better
Administer	Manage or direct the performance of duties or actions
Adopt	To take up and practice as one's own; to accept or carry out a plan
Advise	Recommend a course of action; offer an informed opinion based on specialized knowledge
Analyze	Separate into elements and critically examine, to study or determine relationship or accuracy
Answer	To speak or write in reply to a request
Anticipate	Foresee and deal with in advance, give advanced thought or consideration, remedy in advance
Apply	To put to use for a purpose; to employ diligently or with close attention
Appraise	Evaluate the worth or merit of
Approve	Accept as satisfactory; exercise final authority with regard to commitment of resources
Arrange	Make preparation for an event; put in proper order
Assemble	Collect or gather together in a predetermined order from various sources
Assess	Determine the value or accuracy of; evaluate
Assign	Specify or designate tasks or duties to be performed by others
Assist	To give support or aid
Assure	Give confidence, to make certain, guarantee
Attain	To gain or achieve
Attend	To be present for the purpose of making a contribution
Articulate	To give clear and effective communication
Audit	To make a formal examination or review
Authorize	Approve; empower through vested authority
Budget	To plan the allocation, expenditure, or use of resources, especially money or time
Calculate	Make a mathematical computation; judge to be sure or probable
Clarify	Make something clearer by explaining in greater detail
Classify	To arrange or assign to a category
Collaborate	Work jointly with; cooperate with others, acts as liaison providing a close relationship, connection, or link
Communicate	To impart a verbal or written message; to transmit information
Compare	Determine if two or more items, entries are the same and if they are not, identify the differences
Compile	Put together information; collect from other documents



# Percent to Hour Conversion Tool

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



# Scope of Responsibilities

- Of the options presented, choose the appropriate scope of this position
  - **University-wide:** Scope spans the entire University  
*e.g., Position impacts Colleges, Commonwealth Campuses, **and** Administrative units*
  - **College, Commonwealth Campus, unit-wide:** Scope is specific to one or more College, Commonwealth Campus, or Administrative unit but not the entire University  
*e.g., College of Medicine, Smeal College of Business, Penn State Behrend, or Intercollegiate Athletics*
  - **Department:** Scope spans the entirety of a department within a College, Commonwealth Campus, or Administrative unit  
*e.g., Psychology, Residential Dining, Comparative Medicine, or Center of Performing Arts*
  - **Function, process, or job-specific:** Scope is limited to the area of responsibility  
*e.g., Lab Coordinator, Education Program Specialist, or Facilities Representative*
- Provide additional details if applicable

# Supervisory Responsibilities

- Indicate whether the position has supervisory responsibilities
- Determine the type and scope of supervision the position has:
  - If the position has authority to make decisions related to hiring, compensation, performance evaluation, etc. for *full-time employees*, select “Direct Supervisor for Full-Time Employees.”
  - If the position is not a direct supervisor of *full-time employees* but assists with scheduling, prioritizing tasks, etc. for a team, select “Indirect Supervisor for Full-Time Employees.”
  - If the position has authority to make decisions related to hiring, scheduling, etc. for *wage payroll, student, and/or temporary workers or volunteers*, select “Direct Supervisor for Only Wage Payroll, Student, and/or Temporary Workers or Volunteers.”
  - If the position has no supervisory responsibilities, select “None.”
- If the position has supervisory responsibilities, indicate the number and level(s) of direct staff that the position supervises.

*If the position supervises both individual contributors and other supervisors, select both options.*
- Select the highest level of supervisory responsibilities.

*For example, if the position is a direct supervisor to both full-time staff and student workers, select “Direct Supervisor.”*

# Fiscal Responsibility

- Indicate whether the position has fiscal/financial responsibility.
- Describe the position's level of involvement, if any, with budgets (e.g., planning/forecasting, approving).
- Indicate if the position also has budget responsibilities for grants.
- Indicate if the position has final signature authority (i.e., ability to sign contracts on behalf of PSU per policy FN11) and if so, the scope (e.g., University-wide, Department-wide).
- Indicate the dollar amount of fiscal responsibility if you selected any of the above.
- Provide additional comments as applicable.

# Problem Solving

- Indicate the typical nature of the problems encountered in this position on a regular basis.
- Consider problems and issues faced on a day-to-day basis.
  - Do these problems differ in nature?
  - Can they be solved with clear directions or do they require training, critical thinking, and/or creativity?
- Select only one box and provide additional information if desired.
- Your selection does not need to be a perfect fit. Please select the **best fit** based on the position's primary duties and how you spend the majority of your time.

# Independence of Action

- Indicate the degree of independence of action this position has in conducting work.
- Select only one box and provide additional information if desired.
- Your selection does not need to be a perfect fit. Please select the **best fit** based on the position's primary duties and how you spend the majority of your time.

# Communication and Collaboration

- Indicate the nature of collaboration, interactions, and/or sharing of information to others required in this position.
- Select all statements that apply.
- Your selection does not need to be a perfect fit. Please select the **best fit** based on the position's primary duties and how you spend the majority of your time.

# Supervisor Sections

- The latest JRW includes three new sections that supervisors will complete this year only.
- We are collecting insight on the required and preferred education, experience, and other requirements for each position.
- This information will be used to confirm and/or refine requirements for Penn State's job profiles.
- Information gathered in these sections will be standardized across job profiles as HR reviews all completed JRWs.
- The information the supervisor submits will not necessarily be the final requirements or preferences for the position but will be used to ensure accurate job profiles

# Education Requirements (Only Supervisors Complete)

- Select the education level and specify the field of study that best describes the required and preferred levels for the position.
- For the required sections, describe the **minimum level of education needed for the position.**
- Consider what education level you would look for if you had to rehire for the position tomorrow.
- The required and preferred levels of education may or may not be the same as the current incumbent's individual level of education, either currently or when they started.
- Indicate if relevant experience may substitute for some or all of the education indicated.

# Other Requirements (Only Supervisors Complete)

- List any licenses, certifications, or other requirements that are required or preferred for the position.
- Examples include:
  - Certified Public Accountant
  - Certified Registered Nurse Practitioner
  - Licensed Physician Assistant
  - Project Management Institute (PMI) certification
  - Valid driver's license
- **Do not abbreviate** the names of any required licenses or certifications.

# Work Experience (Only Supervisors Complete)

- Select the experience level and specify the field that best describes the required and preferred position-related work experience to perform the position.
- The required minimum and preferred levels of position-related experience may or may not be the same as the current incumbent's individual level of position-related experience, either currently or when they started.

# Supervisor Review and Submission

- Once an employee completes their JRW, they will submit for their supervisor's review.
- Supervisors will review all JRW sections and either approve or return comments back to the employee for further edits.
- If edits are required, we encourage supervisors and employees to have a conversation around expectations and role requirements.
- Once employees make the appropriate updates (if needed), supervisors will approve the JRW and complete the three additional sections for education, work, and other requirements.

# Best Practices



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# Best Practices – Do

- ✓ 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
- ✓ Include expectations of a fully proficient incumbent meeting all position requirements
- ✓ Use explanatory phrases telling why, how, where, or how often to add meaning and clarity
- ✓ Generally include 4-6 responsibilities

# Best Practices – Do Not

- x Cut and paste information from this guide, job profiles, matrices or any other reference tools
- x Use narrative, first person form, or specific individual names
- x Use unnecessary words that add “fluff” to the duty
- x Base the content on what the **person** doing the position can or can’t do
- x Include one time, short-term assignments or an exhaustive list of all, minor, or occasional tasks
- x Write the JRW based on the desired classification outcome
- x Write the JRW as a procedure manual on how to do the position
- x Utilize template JRWs when positions have notable differences

# JRW Status

- **Not Started**

- Employee has never logged into the JRW application and the position is brand new or a supervisor has reopened a previously completed JRW.

- **In Progress**

- Information has been entered in at least part of the JRW but it has not been submitted for supervisor approval.

- **Pending Approval**

- JRW has been submitted to supervisor for approval but has not yet been approved. The supervisor must log in and take action at this point.

- **Completed**

- Both the employee and supervisor have reached consensus on JRW and it is approved.