1. WHAT IS A POSITION DESCRIPTION (PD)?
   - A translation of broad organizational plans into the assignment of duties and responsibilities

2. WHO IS RESPONSIBLE FOR THE FINAL PD?
   - The MPP Administrator and/or Department Chair in an Academic College department, is responsible for determining the roles, responsibilities, and scope of the position.
   - *STRONG RECOMMENDATION: Areas are encouraged to maintain the electronic WORD version of the position description where others in the department, college, or division may find it for easy future revisions.*

3. WHO IS RESPONSIBLE FOR ASSESSMENT OF APPROPRIATE CLASSIFICATION/JOB CODE, SKILL/GRADE LEVEL?
   - The CSUN Human Resources Classification and Compensation department.

4. WHEN SHOULD A STAFF MEMBER RECEIVE A COPY OF THEIR FULL PD?
   - Within the 1st week of a new appointment
     i. Best Practice: This provides important information regarding expectations and priorities for their work performance
     ii. Compliance: Collective Bargaining Agreement requirement
        1. Please forward the **signed** position description to Human Resources for inclusion in the employee's official personnel file.
   - Seven days prior to a significant change/update
   - Within 30 days from an employee's request for a current position description

5. WHY WAS THE STAFF (PD) FORM REVISED?
   - For compliance and best practices reasons

6. WILL THE PD FORM BE A "SMART" FORM?
   - After this new format has been implemented across the campus, the next generation of the PD form will be reviewed for a "smart" form. However, that is not planned for the immediate future.

7. HOW IS A POSITION DESCRIPTION UTILIZED?
   - A PD is an important tool for a variety of uses:
     i. Appropriate classification,
     ii. Communication tool for Lead/Supervisor/Manager regarding priorities, roles, and expectations,
     iii. Basis to use for employee performance evaluation
     iv. Recruitment

NOTE: The form is not locked/protected in order to facilitate ease of editing, track/review changes, and the spell check function; because of this, you will need to **Ctrl + Click** to open links**.**

Section A: Action Requested

1. Request a New or Fill a Vacant position: Must be initiated through Recruiting Solutions, the online recruitment system.
    a. See guide for Creating a Job Opening from a New or Existing Position:
       https://www.csun.edu/sites/default/files/job-opening-guide-oct2011.pdf
2. Initiate a Classification Review for a filled position *(when 50%+ of the position has changed)*. This may be initiated by the Employee or MPP Administrator
3. Update an existing position description (no classification review requested)
4. New employees/appointments should receive the full PD within one week of start date;
    a. This includes a new appointment as a result of Voluntary/Temp Reassignment
    b. The department maintains the original electronic version for future updates
    c. Forward a copy of the **signed** PD to Human Resources.

Section B: Current Information

Current attributes/information of the position. See Managers Workbench.

1. **Employee ID #:** A 9-digit number beginning with 0 or 1.
2. **Position Number**: An 8-digit number beginning with 997.
3. **Job Code and Grade:** All classifications have a unique classification code and some classifications have multiple salary grades. Example:
    a. 1035 (Admin Support Coordinator) has 2 salary grades;
    b. 1038 (Admin Analyst/Specialist) has 4 salary grades;
    c. 3079 (SSP IA & IB) has 2 salary grades (Grade 1 = IA and Grade 2 = IB);
    d. 3082 (SSP II) only has 1 salary grade
4. **FLSA:** Federal Fair Labor Standards Act:
    a. Job Code/FLSA **Link:** https://www.csun.edu/sites/default/files/CSU-Staff-Job-Codes.pdf
       This link displays a table of all staff classifications and grade levels and their respective FLSA status. Table Example:

Job Code	Grade	Classification Title	FLSA Status	Union Code
1032	1	Admin Support Assistant 12 Mo	Non-Exempt	R07
1032	2	Admin Support Assistant 12 Mo	Non-Exempt	R07
1035	1	Admin Support Coord 12 Mo	Non-Exempt	R07
1035	2	Admin Support Coord 12 Mo	Non-Exempt	R07
1038	1	Admin Analyst/Spclst 12 Mo	Non-Exempt	R09
1038	2	Admin Analyst/Spclst 12 Mo	Exempt	R09
1038	3	Admin Analyst/Spclst 12 Mo	Exempt	R09

    b. Be sure to look-up the Job Code and Grade level as some classifications have a non-exempt level and an exempt level. (Example: 1038-Administrative Analyst/Specialist: Grade 1 = Nonexempt, Grade 2 = Exempt).

5. **Lead:** Non-MPP Staff Lead (if applicable)
6. **MPP Administrator:** 1st level MPP Administrator/Department Chair that position reports to

7. **Sensitive Position:** The link takes you to the CSU Sensitive Positions Table to determine if the position is sensitive: www.csun.edu/hr/background-checks
   a. Sensitive positions are designated by the CSU as requiring heightened scrutiny of individuals holding the position, based on potential for harm to children, concerns for the safety and security of the people, animals, or property, or heightened risk of financial loss to the CSU or individuals in the university community.
   b. Common Examples - If position has access to or responsibility for: ***P-Card, cash, credit card account information, master keys, hazardous substances, operating vehicles, oversight of minors, Level 1 data*** etc.
      i. Examples of **Level 1 data** include but are not limited to:

- *Passwords or credentials that grant access to level 1 and level 2 data*
- *PINs (Personal Identification Numbers)*
- *Birth date combined with last four digits of SSN and name*
- *Credit card numbers with cardholder name*
- *Tax ID with name*
- *Driver's license number, state identification card, and other forms of national or international identification (such as passports, visas, etc.) in combination with name*
- *Social Security number and name*
- *Health insurance information*

- *Medical records related to an individual*
- *Psychological Counseling records related to an individual*
- *Bank account or debit card information in combination with any required security code, access code, or password that would permit access to an individual's financial account*
- *Biometric information*
- *Electronic or digitized signatures*
- *Private key (digital certificate)*
- *Law enforcement personnel records*
- *Criminal background check results*
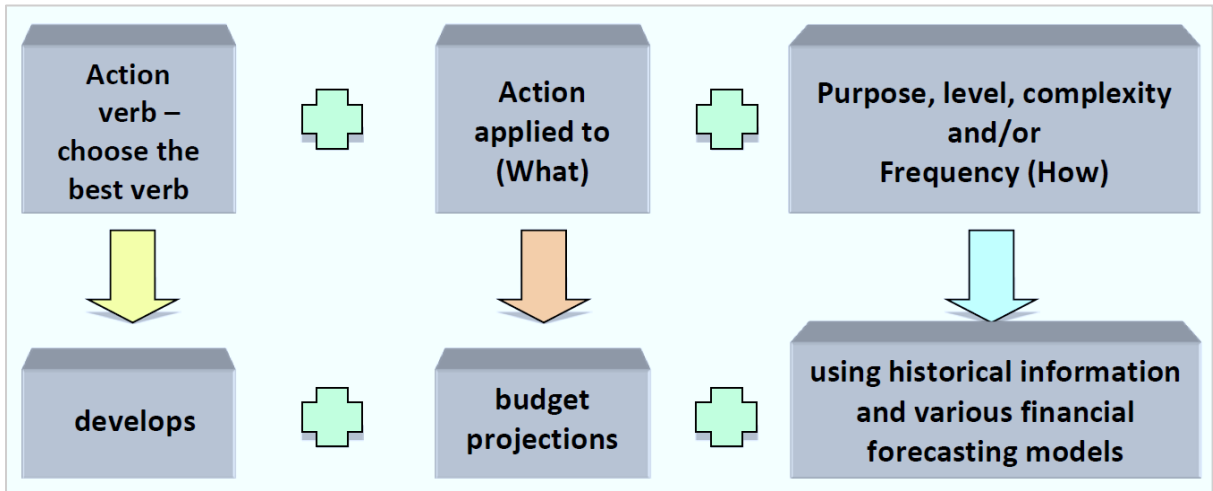
Section C: Position Purpose

1. <u>Briefly</u> describe the reason(s) the position exists (2-5 sentences). Describe the <u>primary function/purpose</u> of the position and the role it plays in the department/organization. **Hint:** Complete Section D. Major Duties first and then compose the brief summary/purpose statement in Section C. afterward.

> ***Example Statement:*** The Front Office Assistant acts as the initial point of contact and provides support customer service for inquiries (phone and in-person) for Business Operations, which requires a general understanding of the functions performed in the other units within the department. In addition, the position ensures all telephone, email and in-person inquiries are triaged; processes paperwork submissions; scans documents; and maintains logs and various front operations metrics and files.

Section D: Major Duties

1. List in order of priority and percent of time (highest to lowest)
2. Indicate the approximate percentage of time given for each area of duty statement, estimated over a year timeframe
   a. Typically 4 to 7 duty statements
   b. Minimum percent should be at least 5%
   c. Recommend "Miscellaneous/Other duties as assigned" = 5% (no more, no less)
   d. Overall percentages should equal 100%
3. **Verbs:** Written in third person singular, present tense (i.e. review**s**, assist**s**, plan**s**, gather**s**)

4. **Adjectives:** <u>Avoid</u> descriptive adjectives about the employee's performance of the duty/responsibility (i.e. efficiently, timely, accurately...).

5. **Duty Statement Formula**: (describe the specific work action)

Action verb – choose the best verb	+	Action applied to (What)	+	Purpose, level, complexity and/or Frequency (How)
⬇		⬇		⬇
develops	+	budget projections	+	using historical information and various financial forecasting models

EXAMPLES:
- **<u>Provides</u>** customer service in-person and/or over the telephone by providing information and resolving inquiries; and **<u>checks</u>** and **<u>updates</u>** logs.
- **<u>Scans</u>** documents into document imaging system; **<u>creates</u>** files; **<u>distributes</u>** documents; and **<u>updates</u>** files, as appropriate.
- **<u>Tracks</u>** the disbursement of funds from a variety of accounts; **<u>prepares</u>** and **<u>evaluates</u>** divisional quarterly reports; and **<u>performs</u>** other duties as assigned.

6. Use action verbs and convey the level or complexity of the work:

General, vague Statements	Higher-level description	Lower-level description
Manages the budget	Develops budget projections using historical information and various financial forecasting models.	Monitors expenses and tracks current budget status, and prepares monthly budget status reports for management.
Advises students	Carries a case load of students and works with them to plan their college and longer-term professional goals and careers.	Answers student questions about academic requirements and course sequencing. Interprets information in the school catalog or bulletin.
Catalogs Library Materials	Performs original cataloging requiring in-depth subject analysis.	Performs copy cataloging and limited original cataloging using established templates and formats.
Handles correspondence	Responds to all inquiries from prospective students related to admission requirements and program eligibility.	Receives all department correspondence, reviews, determines the appropriate recipient and distributes. May draft responses.

7. **Essential Functions/Duties:** Per the Americans with Disabilities Act (ADA), are intrinsic to the work/purpose of the position. The ADA prohibits discrimination against qualified individuals with disabilities who, with or without reasonable accommodation, can perform the

essential functions of a job. Position descriptions must clearly and accurately indicate exactly which functions are **essential**.

- a. **Essential Duty Test:** (Must be performed by the incumbent to achieve required outcomes)
    - i. Does the position exist to perform the duty?
    - ii. Would removing the duty fundamentally alter or eliminate the need for the position?
    - iii. Are many others trained to perform the duty?
    - iv. What is the degree of expertise or skill needed to perform the duty?

Section E: Physical and Cognitive Demands; and Environmental Conditions

1. Check *Greater than 50%, Less Than 50%, or N/A*, for each activity and condition
2. Position descriptions must identify the physical requirements that are necessary to perform the job. These should focus on **what** needs to be accomplished, not how it is done or who it's done by. **Physical demands** must be written to avoid exclusionary terms and must be associated with the essential functions/duties of a position. Include special considerations, such as occasional travel or evening and weekend work.
3. **Minimum Requirement:** These are *'minimum'* and typical requirements for a position, not preferred, regardless of the incumbent.
4. **Accommodations:** This section does not replace the process/practice for requesting individual accommodations.
5. **Elevated Work**: refers to a raised platform or scaffold, rather than climbing a ladder.
6. **Lifting/Carrying Tip:** A standard ream of paper (50 Sheets of 8.5x11 Paper) weighs 5lbs
7. **Open Context Box:** Describe any additional physical, cognitive, and environmental demands/conditions or special circumstances that are pertinent to the position.

Section F: Equipment

1. List any special software, machines, tools, equipment, and/or motor vehicles used on a regular basis.
2. What *equipment*, machines or instruments are used or operated to perform the job?
3. What *systems* are used to complete the work?
4. What *software packages* are used to complete the work and produce results?
5. What *features/tools* of systems and software packages are used?
6. What types of *vehicles* does the position operate? *(i.e. Car, Electric Cart, Forklift)*

Section G: Training and/or Licenses; and Additional Knowledge, Skills, Experience

1. **Training &/or Licenses:** Include required and/or preferred
    - a. If a required training is only provided by the CSU or CSUN (i.e. PCard/Procurement training), then it will be provided once the new employee starts the appointment, and is not required prior to hire.
    - b. **Professional License Table:** www.calstate.edu/hrpims/pims/appendix/professional_license_table.htm
        - i. Lists CSU Class/Job Codes that require a special license, certificate or registration in order to be hired.
        - ii. If requiring or preferring a license/certification for any job code/classification outside of this table, a justification/duty statement must be included on the job description under the Major Duties section.(Example: If requiring or preferring

a Driver's License, Section. D Major Duties should clearly show driving/transporting duties.)

2. **CSU Classification Standards: K**nowledge, **S**kills, and **A**bilities from the CSU Classification Standards do not need to be included on the position description form. HR Recruitment Services will provide the minimum qualifications, per CSU Classification Standards, for all recruitment. The minimum qualifications cannot be changed.

3. Include any additional knowledge, skills, and experience unique to this position in the open text box provided in the 2nd half of this section.

Section H: Lead or Oversight of Other Positions

List Working Title (if applicable), Classification Title, and Position Number of positions (including Student Workers and Volunteers) that incumbent will lead, oversee or provide direct or general work direction, if applicable.

1. **Staff Lead/Overseer:** Generally, non-MPP Staff may lead, oversee, coordinate, and provide input for hiring and evaluations to MPP Administrators. Management and supervision authority is held at the MPP Administrator level.

2. **MPP Administrator/Supervisor:** Have the authority to hire, fire, assign work, counsel, discipline, handle grievances/complaints and conduct performance evaluations.

3. List position classification/job title even if the position is vacant

4. **Pool Positions:** If the position has lead/oversight authority over multiple positions (pool positions), it is not necessary to list each incumbent separately; listing *pool* or the number of positions (i.e. 10 to 20) will suffice.

5. This should include if the lead/oversight duties includes Student Workers and Volunteers.

6. **CSU Definitions:**
   a. **"Lead Workers"** - are responsible for duties that include, but are not limited to: giving work assignments to employees; providing on-the-job training for assigned duties; attempting to resolve workflow or procedural conflicts; providing input to the Appropriate Administrator (including Department Chairs) on the employee's job performance. "Lead workers" are not responsible for administering discipline or responding to grievances.
   b. Higher Education Employer-Employee Relations (HEERA) defines
      i. a **"management"** employee as: "having significant responsibility for formulating or administering policies and programs and having discretion in the performance of their jobs beyond merely conforming to policy," and \
      ii. a **"supervisory"** employee as: "having authority, in the interest of the employer to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline other employees…"
   c. **Staff positions do not have the authority to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline other employees.**

Section I: Changes in Position

1. Summarize the changes in responsibility (work added, changed, or removed).
2. These changes should also be reflected in other sections of the Position Description form.
3. Include changes for Classification Reviews and for Update Only submissions.
4. For Classification Reviews, include any additional information that you think would be helpful in the review of this position.

5. Personal performance information about the employee <u>should not</u> be included under this section as this is not a performance evaluation.

Section J: Signatures

1. **Employee:** Acknowledges reading and receiving a copy of the position description
2. **Leads/MPP Administrators:**
    a. Non-MPP Lead *(if applicable)*
    b. 1st level of MPP Administrator or Department Chair *(required)*
    c. 2nd level of MPP Administrator *(if applicable)*
        i. HR recommends up to 2 levels of MPP Administrator
    d. 3rd level of MPP Administrator *(if applicable)*
        i. Please follow your Division, College and Department practices and requirements.
    e. 4th level of MPP Administrator *(if applicable)*
        i. Please follow your Division, College and Department practices and requirements.
    f. Add additional signature lines if needed.

PLEASE SEND A **<u>SIGNED</u>** COPY OF THE PD TO HR FOR INCLUSION IN THE EMPLOYEE'S FILE.

Questions? Please contact Classification and Compensation at 818-677-2101.

csun.edu/hr/hr-contacts-classification-compensation