2 Job Evaluation

210 General Information

211 Purpose

This chapter:

a. Provides a logical, fair, and consistent framework for determining the measure of relative value of each bargaining unit and nonbargaining unit position.

b. Establishes a process for reviewing and updating job descriptions and qualification standards used throughout the Postal Service™.

c. Outlines the procedures used to request a job evaluation review.

212 Responsibilities

212.1 Chief Human Resources Officer and Executive Vice President

The chief human resources officer and executive vice president is responsible for ensuring that:

a. Each position in the Postal Service is evaluated and assigned to an appropriate grade level.

b. Postal Service employees receive equal pay for substantially equal work.

212.2 Organizational Effectiveness

Organizational Effectiveness:

a. Ensures that the job evaluation policy reflects the Postal Service's commitment to an open, equitable, and cost-effective method of determining the relative value of positions and grade levels, using the appropriate job classification system.

b. Employs the appropriate job analysis tools to identify position duties and responsibilities to achieve organizational objectives.

c. Develops new standard job descriptions and qualification standards, when appropriate.

d. Revises existing standard job descriptions and qualification standards, when appropriate.

e. Evaluates all jobs and assigns the appropriate grade levels.

f. Reviews the grade levels assigned to existing jobs.

g. Processes requests for job evaluation reviews (RFRs) applicable to bargaining unit and nonbargaining unit positions and reviews RFRs submitted by Headquarters and area offices.

h. Reviews requests to rank a bargaining unit position (see Exhibit 212.2, PS Form 820, *Ranking of Position Request*).

Exhibit 212.2(page 1 of 2)
PS Form 820, Ranking of Position Request

UNITED STATES POSTAL SERVICE®

Ranking of Position Request

A. Position to Be Ranked

Name of Office or Organization	**This section to be completed by the Approving Officer**	
	Title	Occupation Code
Suggested Title of Position	Position Identification	Level
Recommended Salary Level *(From Part D)*	Key Position Reference	Craft
Date Submitted	Signature of Approving Official	Date Approved *(DD/MM/YYYY)*

Reason for This Request

B. Position Description (Attach continuation sheet if necessary)

1. Basic Functions

2. Duties and Responsibilities

3. Organizational Relationships

PS Form **820,** March 2014 *(Page 1 of 2)*

Exhibit 212.2(page 2 of 2)
PS Form 820, Ranking of Position Request

C. Evaluation

Instructions: For comparative purposes, select an existing ranked position in the organization that is functionally related to the position being evaluated. If no such position exists, select from a functional area the existing ranked position that is most comparable in terms of duties, responsibilities, and work requirements.

1. Title of Comparison Position

2. Key or Standard Position Number Assigned to Comparison Position	3. Level of Comparison Position

4. Comparative Analysis *(In the table below, compare the position for which a ranking is requested to the comparison position by entering a check in the appropriate column for each component.)*

Descriptive Comparison (Components of New Position)	Rank in Relation to Comparison Position				
	Substantially Below	Below	Approximately the Same	Above	Substantially Above
Difficulty of Work					
Responsibility Exercised					
Scope and Variety of Tasks					
Conditions of Performance, Including Physical Requirements or Hazards					
Skill or Knowledge Requirements					
Experience Requirements					
Public Relations Requirements					

5. Specify any other considerations or unusual conditions that may have a bearing on the salary level of the position for which the ranking is required.

D. Recommendation

On the basis of the analysis completed in Part C, I recommend that this position be placed in Level _____	Signature of Authorized Official	Date *(MM/DD/YYYY)*

E. Review

If you object to any phase of the assignment: (a) notify the installation heads of the nonauthorized features; and (b) caution them concerning permission to perform the duties. In your notification, do not designate any task by level.

Signature of Reviewing Official	Date *(MM/DD/YYYY)*

PS Form **820,** March 2014 *(Page 2 of 2)*

212.3 Initiating Offices

Initiating offices (e.g., Post Offices™, districts, processing and distribution centers or facilities, areas, and Headquarters units):

a. Rank authorized bargaining unit positions within their organizations.

b. Prepare requests to rank bargaining unit positions that cannot be matched to either key or standard job descriptions within their organizations.

c. Prepare RFRs for nonbargaining unit positions.

212.4 District Offices

District offices:

a. Match RFRs to existing job descriptions.

b. Provide comments and input on RFR requests submitted to the area office for review.

212.5 Reviewing Offices

Each reviewing office reviews RFRs and processes them as follows:

a. If the reviewing office concurs, it submits the recommendations as to the validity of a request to the next review level.

b. If the reviewing office does not concur, it returns the request to the requesting official, explaining the reasons for denial.

Management levels of review are defined as follows:

Initiating or Reviewing Office	Level of Review
Post Office/Plant	District
District	Area
Area	Organizational Effectiveness
Headquarters unit	Organizational Effectiveness

213 Job Descriptions

213.1 Maintenance

213.11 Organizational Effectiveness

Organizational Effectiveness maintains a master file of all job descriptions for bargaining unit and nonbargaining unit positions throughout the Postal Service.

213.12 Field

Management officials and support administrative staff in Post Offices and districts can access job descriptions through an electronic database named Job Description (JD) Online or JD Online.

213.2 Access to Job Descriptions

All employees are entitled access to job descriptions for the jobs they currently hold or for which they apply. Installation heads must take the steps necessary to ensure that job descriptions are available to employees.

220 Nonbargaining Unit Positions

221 Job Descriptions

Organizational Effectiveness develops and maintains job descriptions, the basic documents used to describe and evaluate all nonbargaining unit positions. A job description includes information that describes the functional purpose of the position, the essential duties and responsibilities, and the organizational reporting relationship. Information concerning the knowledge, abilities, and skills required to perform the duties and tasks of a position are contained in the position's qualification standards.

222 Requesting a Job Evaluation Review

222.1 Background Information

222.11 Conditions

Employees or managers must initiate a RFR if they believe that:

a. A major aspect of a job's duties and responsibilities has changed; or

b. A major duty has been added that was not considered in the initial job evaluation review.

222.12 Employee-Management Differences

The job evaluation review process is not to be used to resolve disputes between managers and employees over job requirements. A review may be requested if management concurs with an employee that the work performed is not incorporated into the existing job description or job requirements.

222.13 Change in FLSA-Exempt Status

Employees or managers must initiate an RFR if there is reason to believe that a position previously classified as FLSA-exempt no longer qualifies for that status. The request for review is sent to the area Human Resources manager and the Law Department. An FLSA-exempt status may change for any of the following reasons:

a. The work performed by the employee is not consistent with the work requirements set out in the job description.

b. Management determines that the job description's work requirements no longer fulfill operational requirements and wants the employee to perform other work.

c. The position is executive exempt (manager or supervisor) and the manager or supervisor does not supervise two or more career or noncareer employees who collectively work 80 or more hours per week regularly. The 80 or more hours per week includes actual work hours, not other paid hours.

222.2 Documentation Requirements

222.21 Preparing a Request for Review

The incumbent or manager prepares a narrative RFR stating the differences between the content of the employee's assigned position and the actual duties and responsibilities of the position.

222.22 Action at Management Review Levels

Reviewing managers will:

a. Ensure that each RFR is accurate and properly stated.

b. Determine whether the job description assigned to the employee is consistent with the actual duties and responsibilities of the position.

c. Provide a written evaluation that either supports or refutes the RFR. An RFR that does not include a recommendation — either positive or negative — may be returned.

d. Forward the RFR through normal management channels to:

(1) The appropriate district office; or

(2) For area or Headquarters jobs, Organizational Effectiveness, Employee Resource Management.

222.3 Action by Districts

District Human Resources managers analyze the RFR and take one of the following courses of action:

a. Deny the request and prepare a memorandum stating the reasons.

b. Forward the request, with comments and a summary of the analysis, to the area Human Resources manager for review.

222.4 Action by Areas

Area Human Resources managers analyze the RFR and take one of the following courses of action:

a. Deny the request and prepare a memorandum stating the reasons.

b. Forward the request, with comments and a summary of the analysis, to Organizational Effectiveness for review.

222.5 Action by Organizational Effectiveness

For a position that may need nationwide review and for any area or Headquarters position, Organizational Effectiveness analyzes the RFR and takes one of the following courses of action:

a. Denies the request and prepares a memorandum stating the reasons.

b. Approves the request and takes one of the following courses of action:

(1) Revises an existing job description to include the duties and responsibilities resulting from the analysis and makes any necessary changes to the qualification standards.

(2) Develops a new job description that reflects the duties and responsibilities resulting from the analysis and makes any necessary changes to the qualification standards.

(3) 3.Sends an approval memorandum to the initiating employee or manager.

230 Bargaining Unit Positions Covered by a National Agreement

231 Job Descriptions

PS Form 820, *Ranking of Position Request,* (see Exhibit 212.2), is the basic document used to describe and evaluate or rank bargaining unit jobs covered by a collective bargaining unit agreement, and generates the following two types of job descriptions:

a. Key positions (KPs). Used as benchmarks, or models, in the creation of standard positions, KPs are ranked to clearly reflect level distinctions. KPs use general terms to describe the duties and responsibilities of more than one employee.

b. Standard positions (SPs). Although SPs are described in more specific terms than KPs, they also use general terms to describe the duties and responsibilities of more than one employee.

The purpose of a job description is to describe three components of a position:

a. Primary assignment or basic function,

b. Tasks and duties involved in carrying out the primary assignment, and

c. Organizational relationship.

These components constitute the basis for comparing a position with key positions and for aligning it with other positions in the Postal Service.

Note: The job description terminology used in 231 is based on existing regulations.

232 Using PS Form 820

232.1 Background

232.11 Purpose

PS Form 820 is used to establish and review rankings of bargaining unit positions in the field and in certain area and Headquarters units. It serves to document requests for a new position or for changes to an existing one. In most cases, this form is not required because of the number of positions already in existence to which work can be matched.

232.12 Conditions

If a position's duties and responsibilities change or a new position is needed, the Installation Head, functional manager, or designee must complete a PS Form 820 with assistance from Organizational Effectiveness.

Exception: If a position changes as a result of a national review of bargaining unit positions, Organizational Effectiveness completes the form.

232.2 Documentation Requirements

232.21 Preparing PS Form 820

Installation heads enter the following information on the form:

a. Position to Be Ranked:

(1) *Name of Office or Organization.* Enter the name of the Post Office or other Postal Service installation where the position exists.

(2) *Suggested Title of Position.* Enter the title proposed for the position to be ranked.

(3) *Recommended Salary Level.* Enter the level from Part D on page 2.

(4) *Date Submitted.* Enter the date on which the PS Form 820 is submitted.

(5) *Reason for This Request.* Enter the reason for submitting the PS Form 820.

b. Job Description:

(1) *Basic Functions* (Item B.1). Describe the position's basic function in a concise statement that explains the position's primary purpose. For example, "Makes general repairs on a variety of postal and building equipment on a tour when no other mechanics are present; performs clerical tasks related to the scheduling, control, and reporting of plant maintenance activities." Do not attempt to describe the specific tasks associated with the position in Item B1; this information goes in Item C.

(2) *Duties and Responsibilities* (Item B.2). Enter the individual tasks performed in carrying out the basic function:

(a) Explain the tasks in detail sufficient to provide a clear understanding of the work, referring to the evaluation factors given in Part C. These include trade fields in which the work is performed, type of equipment worked on, commonly used hand and power tools, and nature and extent of repairs. Describe work conditions such as "in and around moving machinery," "bench work," or "outside work."

(b) Explain responsibilities in terms of decisions. For example, "removes needed equipment from service for repair," or "requests additional mechanical or supervisory assistance."

(c) Note skills, knowledge, and/or experience necessary to accomplish the basic function efficiently, especially where the task description does not make these qualities readily apparent. Avoid listing an incumbent's or applicant's specific qualities, unless those qualities are clearly essential to the position.

(d) Note the duties and responsibilities assigned to the position that are beyond the scope of the basic function.

Estimate the percentage of time devoted to the separate tasks. Also note tasks performed at intervals other than daily (e.g., quarterly, semiannually, annually).

(e) If the position is composed of a combination of tasks requiring materially different skills and knowledge, estimate the percentage of time to be devoted to each area.

(f) Avoid ambiguous terms like assists or processes. If such a term is used, specify the work tasks attached to that position feature.

(3) *Organizational Relationships* (Item B.3). Give the title and grade of the position's immediate supervisor, and:

(a) If the immediate supervisor works a different tour than the incumbent, give the supervisor's tour time.

(b) If the supervisor works in a different building, make a notation.

(c) Explain the nature and extent of:

(i) Instructions given to the incumbent before, during, and after task performance.

(ii) Available guidelines and procedures directly applicable to the work.

(iii) Review of the finished work.

(d) If more than one supervisor in the chain of command reviews finished work, make a notation.

c. Evaluation:

(1) When choosing a position for comparison in item C.1, select a ranked position in the installation closely related in function to the position under analysis. If no closely related position exists, select one with similar work processes or other characteristics.

(2) Complete items C.2 and C.3.

(3) Rank factors in comparative, not absolute terms. For example, if neither position involves contact with the public, check "Public Relations Requirements" in item C.4 as "Approximately the Same." Comparison reflects the evaluator's best judgment, based on knowledge of both the comparison position and the position under review.

(4) Complete item C.5, as applicable.

d. Recommendation: After completing Part C, recommend a position level (grade level), then sign and date the entry.

232.22 Action at Management Review Levels

Reviewing managers review the initiating office's recommendations and take one of the following actions:

a. If they do not concur with the initiating office's recommendations, they return the unsigned PS Form 820 with a memorandum explaining reasons for disapproval.

b. If they concur with the initiating office's recommendations, they forward the request to the next higher management level for review, as appropriate.

232.3 Action by Districts

District Human Resources managers take one of the following courses of action:

a. If the job can be matched to an existing key or standard position, they forward the PS Form 820 signed and dated, to the area Human Resources manager for review.

b. If the job cannot be matched to an existing key or standard position, they forward the PS Form 820 with Part C left blank to the area Human Resources manager for review.

232.4 Action by Areas

Area Human Resources managers take one of the following courses of action:

a. If they do not concur with the district's conclusions, the manager returns the PS Form 820 to the initiating office, along with a memorandum stating the reasons for nonconcurrence, and sends a copy of PS Form 820 to the district Human Resources manager.

b. If they concur with the district's conclusions, the manager forwards the PS Form 820 to Organizational Effectiveness for review.

232.5 Action by Organizational Effectiveness

Organizational Effectiveness (OE) takes one of the following courses of action:

a. If OE does not concur with the area's conclusions, it returns the PS Form 820 to the area with a memorandum stating the reasons for nonconcurrence.

b. If OE concurs, it takes the following steps:

(1) Evaluates the job against an existing key or standard position, then either:

(a) Revises an existing standard position; or

(b) Establishes a new standard position.

(2) After completing the job evaluation, OE forwards the new or revised job description to Labor Relations for review, craft determination, and any further action required under terms of the applicable national agreement.

(3) After final approval, OE sends a formal response to the area Human Resources manager that includes steps for implementation.

233 Evaluating Bargaining Unit Positions

233.1 Purpose

Evaluating bargaining unit positions consists of establishing a clear understanding of the duties, responsibilities, and work requirements of a position. Careful description of the position ensures that employees receive equal pay for substantively equal work.

233.2 Basis for Position Evaluation

The comparison of a position's duties, responsibilities, and work requirements to key job descriptions serves as the only basis for evaluation.

a. The following factors determine final ranking:

(1) Difficulty of the work to be performed.

(2) Degree of responsibility to be exercised.

(3) Scope and variety of tasks involved.

(4) Conditions under which the work is performed.

b. The following factors do not affect the final ranking:

(1) The incumbent's knowledge, skills, abilities, or previous position title.

(2) Designation of the hiring list or the maintenance craft's internal promotion eligibility register or preferred assignment register (as applicable) from which the employee will be selected.

233.3 Criteria for Evaluating Mixed Assignments

The criteria for evaluating mixed assignments are as follows:

a. *Regularly scheduled to two bargaining unit positions on a daily basis.* When a full-time employee is scheduled every workday to perform the work of two separately defined bargaining unit positions in two different grades, the employee is placed in the position of the higher grade. The duties of the lower grade position, while included in the work assignment, represent extra duties in relation to the official position and do not affect the pay grade of the employee.

b. *Regularly scheduled on intermittent days in two bargaining unit positions.* When a full-time employee is regularly scheduled on intermittent workdays to perform the work of two separate bargaining unit positions in different grades, the employee is placed in the position in which more than 50 percent of the time is spent. If the time is equally divided, the employee is placed in the higher grade position.

c. *Regularly scheduled on intermittent days to more than two bargaining unit positions.* When a full-time employee is scheduled on intermittent days to perform the work of more than two bargaining unit positions in different grades, and less than 50 percent of the time is spent in a single position, the total work assignment of the employee is separately defined as a position and ranked in an appropriate grade.

d. *Regularly scheduled to perform work in two or more bargaining unit positions in the same grade.* When a full-time employee is regularly scheduled to perform the work of two or more bargaining unit positions

in the same pay grade, the employee is assigned to the position in which more than 50 percent of the time is spent. If the work is evenly divided between two positions, or if less than 50 percent of the time is spent in a single position, the work assignment of the employee is separately defined and an appropriate title is assigned.

234 Appeals

Employees with positions covered by a collective bargaining agreement may grieve the salary level, title, or identification of their positions through the agreement's grievance-arbitration procedures.

240 Other Bargaining Unit Positions

To establish or change bargaining unit positions that are not covered by a particular collective bargaining unit agreement, this requires submission of a narrative request or PS Form 820. Employees should direct questions regarding these position evaluations to Organizational Effectiveness.

250 Position Reviews

To ensure proper identification of a position and proper evaluation of the position's duties and responsibilities, Organizational Effectiveness or other appropriate management officials may review any position at any time — by correspondence or on-site interview. These officials may direct appropriate action to correct the improper evaluation or identification of a position.

251 Qualification Standards

251.1 General

All candidates must meet the appropriate qualification standards for positions. The statements of knowledge, skills, and abilities establish the minimum requirements that candidates must meet.

251.2 Sources

251.21 Nonbargaining Unit and Bargaining Unit Positions

Qualification standards for Postal Service nonbargaining unit positions are available in electronic form on the Postal Service Intranet under the Human Resources homepage (as described in 251.22). These do not include qualification standards for positions in the Postal Career Executive Service (PCES), which do not exist.

Qualification standards for use in entrance and in-service placement for Postal Service bargaining unit positions are found on the Postal Service Intranet under the Human Resources homepage (as described in 251.22). The application of these standards must be consistent with the applicable provisions of the appropriate collective bargaining agreement. See

Handbook EL-312, *Employment and Placement,* 76, Bargaining Position Qualification Standards, for more information.

251.22 Qualification Standards Online

Qualification standards for Postal Service nonbargaining unit (except PCES) and bargaining unit positions are available in electronic form on the Postal Service Intranet, as follows:

a. Go to *http://blue.usps.gov/wps/portal*.

b. In the right column, under Human Resources, click *HR Home.*

c. In the HR Department section, click *Employee Resource Management.*

d. Scroll down to Who Are We? and click *Organizational Effectiveness.*

e. Scroll down to Essential Links and click Job Descriptions/Qualification Standards (JD OnLine).