2 Job Evaluation

210 General Information

211 Purpose

This chapter:

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

b. Details the process used to review and update job descriptions used throughout the Postal Service™.

212 Responsibilities

212.1 Executive Vice President, Chief Human Resources Officer

The Executive Vice President, Chief Human Resources Officer, is responsible for ensuring that:

a. Each position in the Postal Service is evaluated and placed in an appropriate salary grade.

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

212.2 Organizational Design and Management, Employee Resource Management

Organizational Design and Management:

a. Develops new position descriptions.

b. Revises existing position descriptions.

c. Evaluates all positions and establishes grades.

d. Reviews grades assigned to existing jobs.

e. Matches duty assignments to existing position descriptions.

f. Processes requests for job evaluation review (RFRs) and PS Form 820, *Ranking of Position Request* (see Exhibit 212.2).

g. Reviews all requests submitted by Headquarters and area offices.

Exhibit 212.2
PS Form 820, Ranking of Position Request

UNITED STATES POSTAL SERVICE™

Ranking of Position Request

1. Name of Office or Organization		**This Section Completed by Approving Officer**	
		Title	Occupation Code
2. Suggested Title of Position		Position Identification	Level
3. Recommended Salary Level (From item 7)		Key Position Reference	Craft
4a. Date Submitted	4b. Reason for This Request	Signature of Approving Official	Date Approved

5. Position Description *(Attach continuation sheet if necessary)*

a. Basic Functions

b. Duties and Responsibilities

c. Organizational Relationships

PS Form **820**, September 1987

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

6. Evaluation Report

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

a. Title of Comparison Position

b. Key Position/Standard Position Number Assigned to Comparison Position

c. Level of Comparison Position

d. Comparative Analysis *(Compare the position for which a ranking is requested against 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					

e. Specify any other considerations or unusual conditions or circumstances which may have a bearing on the salary level of the position for which the ranking is requested.

7. Recommendation

a. On the basis of the analysis completed above, I recommend that this position be placed in Level

b. Signature of Authorized Official

a. Date

8. Review

a. If you object to any phase of the assignment, please notify the installation heads of the nonauthorized features and caution them concerning permission to perform the duties. In your notification avoid attempting to designate any task(s) by level.

b. Signature of Reviewing Official

c. Date

PS Form **820**, September 1987 *(Reverse)*

212.3 Initiating Offices

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

a. Rank authorized bargaining unit positions within their delegated authority.

b. Prepare requests to rank bargaining unit positions that cannot be matched to key or standard position descriptions within their delegated authority.

c. Prepare requests for job evaluation action on nonbargaining unit positions.

212.4 District Offices

District offices:

a. Match requests for job evaluation actions to existing job descriptions.

b. Provide comments and input on requests for review of current grades of positions submitted to Organizational Design and Management, Employee Resource Management (ERM), for review.

212.5 Reviewing Offices

Each reviewing office:

a. Reviews requests for job evaluation action.

b. Submits comments and recommendations on the validity of the requests.

Management levels of review are defined as follows:

Initiating or Reviewing Office	Next Management Level of Review
Post Office	District
District	Area
Area	Organizational Design and Management, ERM
Headquarters units	Organizational Design and Management, ERM

213 Position Descriptions

213.1 Maintenance

213.11 Organizational Design and Management, Employee Resource Management, at Headquarters

Organizational Design and Management maintains a master file of all position descriptions for bargaining unit and nonbargaining unit positions.

213.12 Field

Post Offices and districts maintain position descriptions for the positions within their jurisdictions.

213.2 Access to Job Descriptions

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

220 Nonbargaining Unit Positions

221 Standard Position Descriptions

Organizational Design and Management develops and maintains standard position descriptions (SPDs), the basic documents used to describe and evaluate all nonbargaining unit positions. An SPD 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 Request for Job Evaluation Review

222.1 Background Information

222.11 Conditions

Employees or managers who believe substantive information has been overlooked in a job evaluation may initiate a request for job evaluation review.

222.12 Employee-Management Differences

Disagreements between employees and managers over job requirements must be resolved at the local level and not by initiating an RFR.

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 SPD and the actual duties and responsibilities of the position.

222.22 Signing Off at Management Review Levels

Reviewing managers:

a. Ensure accurate presentation and documentation.

b. Determine whether the SPD assigned to the employee is consistent with actual duties and responsibilities.

c. Provide an evaluative statement, in writing, that either supports or refutes the RFR. Requests that do not include positive or negative input must be returned.

d. Forward the RFR through normal management channels to the appropriate district office, or, for area or Headquarters jobs, to

Organizational Design and Management, Employee Resource Management.

222.3 Action by Districts

District Human Resources managers:

a. Analyze the RFR and take one of the following courses of action:

(1) If the request is within their authority:

(a) Approve the request, match the request to an existing SPD, and prepare a Staffing Change Notice, showing the proper title, grade, and occupation code.

(b) Deny the request and prepare a memorandum stating the reasons.

(2) If the request is *not* within their authority, forward the request to the area Human Resources manager for review with a summary of their analysis and comments.

b. Send the Staffing Change Notice or memorandum to the initiating employee's manager or installation head through normal managerial channels.

222.4 Action by Areas

Area Human Resources managers:

a. Analyze the RFR and take one of the following courses of action:

(1) If the request is within their authority:

(a) Approve the request, match the request to an existing SPD, and prepare a Staffing Change Notice, showing the proper title, grade, and occupation code.

(b) Deny the request and prepare a memorandum stating the reasons.

(2) If the request is not within their authority, including any request involving area positions, forward the request to Organizational Design and Management for review with a summary of their analysis and comments.

b. Send the Staffing Change Notice or memorandum to the initiating employee or manager, with a copy to the district Human Resources manager.

222.5 Action by Organizational Design and Management

For a position that may need nationwide review and any area or Headquarters positions, Organizational Design and Management:

a. Analyzes the RFR and takes one of the following courses of action:

(1) Matches the request to an existing SPD and prepares a Staffing Change Notice, showing the proper title, grade, and occupation code.

(2) Revises an existing SPD to include the duties and responsibilities contained in the request and prepares a Staffing Change Notice.

(3) Develops a new SPD covering the duties and responsibilities contained in the request and prepares a Staffing Change Notice.

(4) Denies the request and prepares a memorandum stating the reasons.

b. Sends the Staffing Change Notice or memorandum to the initiating employee or manager, with copies to the area and district Human Resources managers for field or area request, as appropriate.

230 Bargaining Unit Positions Covered by a National Agreement

231 Unit Position Descriptions

PS Form 820 (see Exhibit 212.2), the basic document used to describe and evaluate or rank bargaining unit jobs covered by the national agreement, generates the following two types of position descriptions:

a. *Key Positions (KPs or benchmarks).* Ranked through legislation to clearly reflect level distinctions, these deliberately use general terms to describe the duties and responsibilities of more than one employee.

b. *Standard Positions (SPs).* These generate more specific ranks than key positions, but still deliberately use general terms to describe the duties and responsibilities of more than one employee.

The purpose of a position description is to describe three components of a position: (a) the primary assignment or basic function, (b) the tasks and duties involved in carrying out the primary assignment, and (c) the organizational relationship. These components constitute the basis for comparing the position with key positions and for aligning it with other positions in the Postal Service.

232 Use of 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 change to an existing one. In most cases, the need for this form is not required because of the number of positions already in existence to which work can be matched.

232.12 Conditions

In most cases installation heads hold the authority to evaluate authorized positions that match key or standard positions for levels PS-5 and below; in these instances, no PS Form 820 needs to be completed. If a new or changed position does not match a key or standard position, level PS-5 or below, a PS Form 820 must be completed.

If a position's duties and responsibilities change, or if there exists a need to create a new position, except in those cases where Organizational Design and Management completes it as a result of a national review, the installation head must complete a PS Form 820.

232.2 Documentation Requirements

232.21 Preparing PS Form 820

Installation heads enter the following information on the form:

a. Heading entries:

(1) *Name of Office or Organization (Item 1).* Insert the name of the Post Office or other postal installation where the position exists.

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

(3) *Recommended Salary Level (Item 3).* Enter the PS level from Item 6D on the back of the form.

(4) *Date of Submission (Item 4a).* Enter the date on which the Ranking of Position Request is submitted.

(5) *Reason for This Request (Item 4b).* Enter the reason for submitting the PS Form 820.

b. Body entries:

(1) *Basic Function (Item 5a).* 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 details of the position in this section.

(2) *Duties and Responsibilities (Item 5b).* 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 Item 6 (for example, trade fields in which the work is performed; type of equipment worked on; commonly used hand and power tools; nature and extent of repairs; and work conditions (for example, in and around moving machinery, bench work, outside work).

(b) Explain responsibilities in terms of decisions (for example, removing needed equipment from service for repair or requesting additional mechanical or supervisory assistance).

(c) Note skills, knowledge, 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 particular qualities, other than those clearly essential to the position.

(d) Note duties and responsibilities assigned to the position beyond the scope of the basic function. Estimate the percentage of time devoted to the separate tasks. Also note tasks performed at stated intervals (quarterly, semiannually, annually, etc.), other than daily.

(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 5c).* 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, note this.

(c) Explain the nature and extent of:

(i) Instructions received 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, note this.

(4) *Evaluation Report (Item 6).* Proceed as follows:

(a) When choosing a position for comparison, 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.

(b) Rank factors in comparative, not absolute terms. For example, if neither position involves contact with the public, check "Public Relations Requirements" under section 6d as "Approximately the Same." Comparison reflects the evaluator's best judgment, based on knowledge of both the comparison position and the position under review.

(c) After completing Items 6b and 6c, where appropriate, enter the PS level recommendation in Item 7a.

(5) *Signature and Date of Authorized Official (Items 7b and 7c).* Sign and date the PS Form 820, certifying the accuracy and completeness comparable to other official certifications.

232.22 Signing Off at Management Review Levels

Reviewing managers:

a. Review the initiating office's recommendations.

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

c. If they concur with the initiating office's recommendations, 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 position is listed in the *Bargaining Unit Position Authorization Guidelines* (available from Organizational Design and Management at Headquarters):

(1) Match the request to an existing key or standard position and prepare a Staffing Change Notice showing the proper title, grade and occupation code.

(2) Return the original PS Form 820, signed and dated, to the initiating installation.

b. If the job cannot be matched to an existing key or standard position, forward the PS Form 820 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, return the PS Form 820 to the initiating office and prepares a memorandum stating the reasons.

b. If they concur with the district's conclusions, forward the PS Form 820 to Organizational Design and Management for review.

232.5 Action by Organizational Design and Management

Organizational Design and Management:

a. Evaluates the job against an existing key or standard position, revises an existing standard position, or establishes a new standard position.

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

c. After final approval, returns the PS Form 820 to the initiating office, with copies to the area and district Human Resources managers for field or area request, as appropriate.

233 Evaluation of Bargaining Unit Positions

233.1 Purpose

Effective evaluation requires a clear understanding of the position duties, responsibilities, and work requirements. Careful description of the position ensures that employees receive equal pay for substantively equal work.

233.2 Basis for Position Evaluation

Comparison of a position's duties, responsibilities, and work requirements to key position descriptions serves as the only basis for evaluation. Specifically, the following factors determine final ranking:

a. Difficulty of the work to be performed.

b. Degree of responsibility to be exercised.

c. Scope and variety of tasks involved.

d. Conditions under which the work is performed.

The following factors do not affect the position evaluation:

a. The incumbent's knowledge, skills, abilities, or previous position title.

b. Designation of the register from which the employee will be selected.

233.3 Criteria for Evaluating Mixed Assignments

Criteria for evaluating mixed assignments are as follows:

a. *Regularly Scheduled to Two Positions on a Daily Basis.* When a full-time employee is scheduled every workday to perform the work of two separately defined 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 Positions.* When a full-time employee is regularly scheduled on intermittent workdays to perform the work of two separate 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 Positions.* When a full-time employee is scheduled on intermittent days to perform the work of more than two 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 Positions in the Same Grade.* When a full-time employee is regularly scheduled to perform the work of two or more positions in the same salary 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 agreements between the Postal Service and the American Postal Workers Union; National Association of Letter Carriers; National Rural Letter Carriers Association; and National Postal Mail Handlers Union requires submission of a narrative request or PS Form 820. Any questions regarding these position evaluations should be directed to Organizational Design and Management.

250 Position Reviews

To ensure proper position identification and proper evaluation of position duties and responsibilities, Organizational Design and Management or other appropriate officials in management may review any position at any time by correspondence or onsite interview. These officials may direct appropriate action to correct improper position evaluation or identification.