HARVARD HUMAN RESOURCES

Position Documentation and Questionnaire Form (PDF/PDQ)

This form is being used for the purpose of:

☐ Job review/reclassification   ☐ New position classification

Instructions: Please review this form, and complete it as fully as you possibly can (not all sections of this form will be applicable to all positions.) Enter your responses in the gray sections below each question and return it to your manager and/or Human Resources Office upon completion.

EMPLOYEE INFORMATION

Name:	Department or unit:
Date:	Current job title and grade:
Email:	Requested job title and grade:
Phone:	

JOB SPECIFICATIONS

JOB RESPONSIBILITIES
Please describe the primary role and function of the position in your department. Provide examples. This section can be written as a one paragraph job description. Please describe (outline) significant changes in the position:

PRIMARY ROLE DESCRIPTION
Please identify specific duties and responsibilities and provide a breakdown of the approximate percentage (ideally not greater than 20% or less than 5%) of time spent, on average, on each duty (separate activities as opposed to grouping them).

Job activities	% of time	New duty or change?

Describe the department's organization (to whom does the position report; who heads the department, etc.). Either write a description of the organizational chart in the gray box or attach a copy of the organizational chart to this document (Your supervisor or HR can help with this, if you do not have a chart).

Describe any similar positions within the department and how these positions interact with your position. Also include the reporting structure to the extent known. Please include as many positions as necessary to explain fully, and please include information about how your position is similar or different to others.

Describe the department's role and function within the School/Unit to which you belong. Include any additional information about your department, if you feel it would be helpful.

POSITION SCOPE AND IMPACT

Explain the impact, to the extent possible, that the work of this position has within the department, inside Harvard and/or outside the University, if applicable.

Describe the constituents, both internal and external to Harvard, with whom this position works most closely.

INDEPENDENT JUDGMENT AND DISCRETION

Please provide examples of the types of problems that this position is responsible for solving independently. Indicate instances where it is necessary to use originality, creativity, fact finding, or analysis.

In what difficult situations does this position make independent judgments? In what situations would this position seek advice from a supervisor?

JOB REQUIREMENTS

LICENSES, SKILLS, AND EXPERIENCE
Please list any specific education, training, or certification that is required for the successful performance of this job.

Describe any specialized equipment or technology used in this position, if applicable. *If this position is an information technology job, please also complete the additional documentation section of this form.*

Indicate any education, specific degree, major, license, registration, or certification required, as you would in our online recruiting system, and why it is needed:

Degree	License	Certification
Major	Registration	Other

Why are these needed?

SUPERVISORY RESPONSIBILITIES

Is this position responsible for managing a department or unit? If so, please name the department or unit.
☐ No   ☐ Yes, department/unit:

Designate the type of staff this position supervises using the following categories: overtime eligible, exempt, temporary, Harvard student worker, and independent contractor. Please also note the number of individuals this position supervises.

Check off the primary supervisory responsibilities of this position.
☐ Conducts interviews independently
☐ Directs the work of other employees and assigns significant tasks. Provide an example:

☐ Independently prepares and delivers performance evaluation(s)
☐ Hires, transfers, promotes staff
☐ Takes disciplinary action
☐ Makes recommendations for termination

FUNCTIONAL MANAGEMENT

What responsibility does this position have for establishing, interpreting and/or implementing plans, policies or procedures? Provide an example(s) that demonstrate this responsibility.

Describe the major financial decisions this position makes, and the effect that these decisions have on the overall operating or financial success of the unit, school, or the University.

Include the sizes(s) of the annual budget(s) for which this position is responsible:

Operating	Capital
Non-federal sponsored research	Federal sponsored research
Endowment	Other (please explain)

If the position manages a segment of the department budget, indicate the line item(s).

How much authority for spending funds does this position have? Is there a maximum? Provide examples.

If this position manages grants and/or restricted funds, indicate the types of funds and numbers of each, stating dollar amounts.

Does this position have the authority to appropriate funds to different areas? If so, for which line item(s) in the budget?

☐ No   ☐ Yes, name the line items:

COMMENTS AND SIGNATURES

STAFF MEMBER'S COMMENTS
Please provide any further comments you have about your position:

Staff Member's Signature:

_____

Date:

SUPERVISOR'S COMMENTS
Please provide comments about the accuracy and completeness of this form:

Supervisor's Signature:

_____

Date: *HR Department:*

By signing this document, you are acknowledging receipt. Your signature does not indicate your opinion of the information contained in it. You will have further opportunity to contribute your opinion during the HR review process.

Please note:

If you are an overtime-eligible staff member seeking reclassification of your position within the non-exempt grades, you have now completed this form. If this position is an information technology job, please also complete the following documentation section of this form.

ADDITIONAL DOCUMENTATION FOR INFORMATION TECHNOLOGY POSITIONS ONLY

Does this position perform systems analysis techniques and procedures, including consulting with users to determine hardware, software, or system functional specification(s)? Provide an example of this.

Does this position design, develop, document, analyze, create, test, or modify computer systems or programs, including prototypes, based on and related to user or system design specifications? Provide an example of this.

Does this position design, document, test, create or modify computer programs related to machine operating systems? Provide an example of this.

Describe the types and amount of hardware, network and/or related equipment work for which this position is responsible.

What computer languages is this position responsible for utilizing? If programming, what is the percentage of time spent on this function?   Include skill level (beginner, intermediate, or expert).

Computer Languages	Skill Level	Time Percentage

Thank you for completing this form!

ADMINISTRATIVE SECTION FOR HR/MANAGERS ONLY

This section may be completed by Human Resources and/or the incumbent's manager. Specific questions may be more applicable if a position is to be posted and/or funding for an existing position changed.

Today's date:

MAIN HR CONTACT

Name	Phone 617-	Email @

SECOND CONTACT

Name	Phone 617-	Email @

Supervisor's name, department, phone, email, ID#, office location, (use street address):

Title	PeopleSoft group ID #
Dept.	Proposed work address

Is this a new position?

☐ Yes

☐ No	If no, name the last incumbent:

Is this a request for a position review?

☐ No

☐ Yes	If yes, please complete incumbent data below:

Current incumbent's name	
Incumbent's phone	
Incumbent's email	
Current salary grade	
Current job function	
Current job class code	
Hours per week	
Proposed work schedule	

Is there a candidate in mind?   ☐Yes   ☐No

ENTER CANDIDATE INFORMATION BELOW:

Last name: First name:

Affirmative Action goals for job posting:

Has this position been approved in your budget?   ☐Yes   ☐No

Yes ☐	No ☐	Will this position have unsupervised access to dorms, valuable artifacts, drugs, radiological materials, or animal care facilities?
Yes ☐	No ☐	Will this position supervise minors (under age 18) in the regular course of duties?
Yes ☐	No ☐	Will this position have access to highly sensitive or confidential data systems?
Yes ☐	No ☐	Will this position have access to aggregate credit card data of cardholders that have been charged by Harvard University?
Yes ☐	No ☐	Will this position have the ability to authorize and/or approve transactions of $50,000 or more?

Is this position grant funded?   ☐Yes   ☐No

Is the position ARRA funded?   ☐Yes   ☐No

Is this position a term appointment? ☐Yes   ☐No

If yes, what is the term of this position?

Budgeted salary range: Min: $ Max: $

Budget code	999-99999-9999-999999-999999-9999-99999

Comments: (is this a job share, flexible hours available, etc.)

If sent to **Labor Relations:** Approval	**Compensation:** Approval

APPENDIX FOR HR/MANAGERS
This section may be completed by those working in the Medical Area.

ENVIRONMENTAL HEALTH AND SAFETY
Will this position be working with animals?

☐ No

☐ Yes	If yes, check off the animal species type below:		

☐	Cats	☐	Guinea pigs		
☐	Dogs	☐	Hamsters	☐	Rats
☐	Fish	☐	Mice	☐	Sheep
☐	Frogs	☐	Non-human primates	☐	Other
☐	Gerbils	☐	Rabbits		

Will this candidate be exposed to any toxic, radioactive, or infectious materials?
☐ No   ☐ Yes, please list:

Will this candidate be exposed to human blood, primary tissue, or cell lines?
☐ No   ☐ Yes