



# WRITING EFFECTIVE, ACCURATE POSITION DESCRIPTION QUESTIONNAIRES

## Position Description Questionnaire Training Sessions

Spring 2010

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 **SIBSON CONSULTING**  
A DIVISION OF SEGAL

# Introduction

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## ➤ **Met-Meet's Online Meeting Source**

- Leo Burstein
- MET Computer Services
- Met-Meet application is used for Metropolitan College's Blended Programs

## ➤ **Testing Moderator:** John Klaus

## ➤ **Chat Room Moderators:**

- Mike Kerr
- Gina Dunn
- Robert Bueno

## ➤ **PDQ Tool Developers:** Sibson Consulting

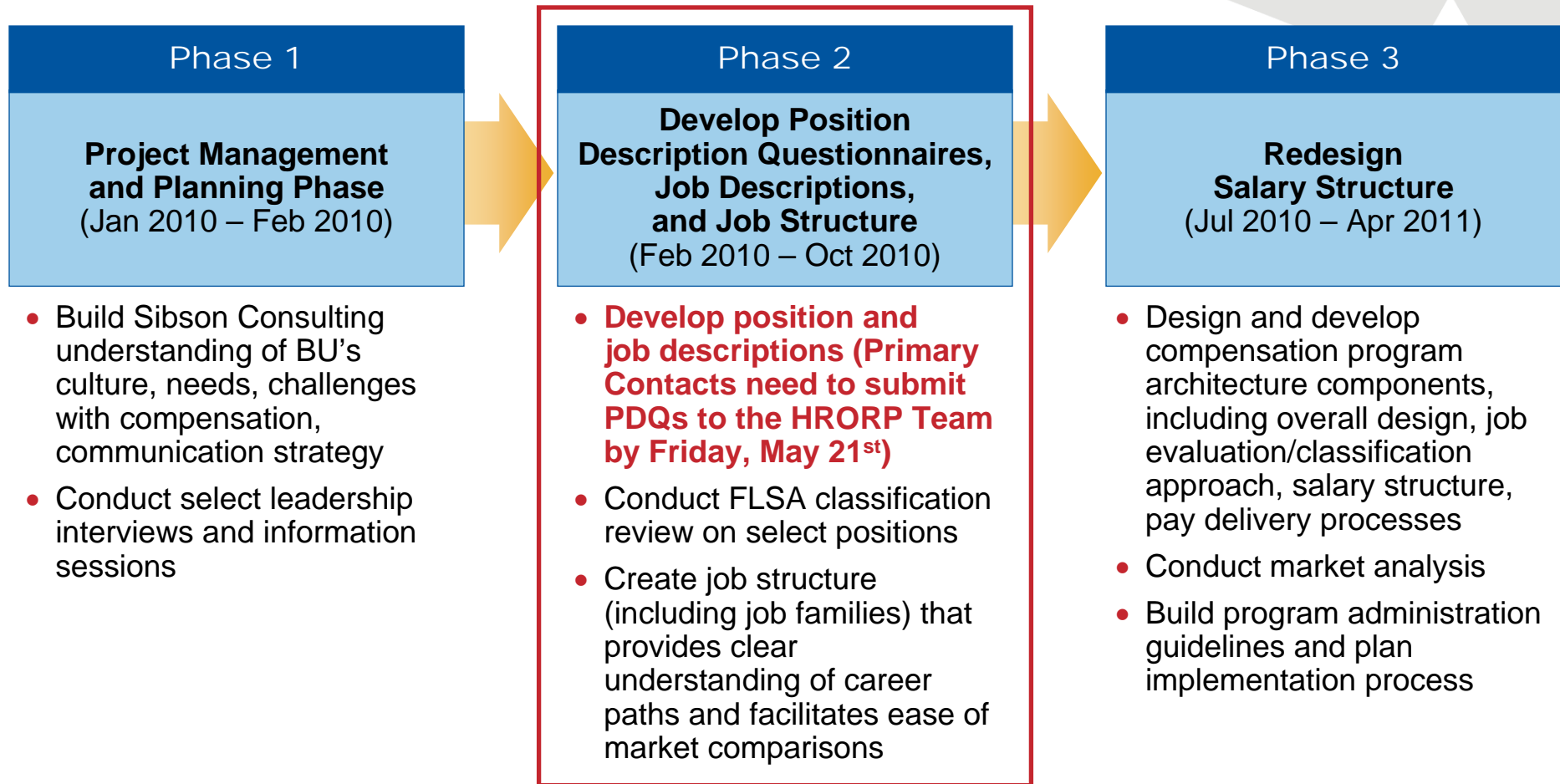
- Karen Hutcheson
- Mike Pressman
- Carolyn Wong

# Today's Objectives

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- 1 Understand why the new Position Description Questionnaire (PDQ) was developed
- 2 Review the new PDQ Tool and learn how to use it
- 3 Discuss the process for completing, submitting, reviewing, and approving PDQs

# Where do PDQs fit into the Human Resources Organizational Readiness Project?



**The aggressive timeline is dictated by SAP implementation.**

# Why are PDQs important?

- Completing PDQs is a prerequisite for the successful implementation of SAP
- Necessary for the creation of a Job Structure and Salary Structure
- Accurately describes the essential functions and MINIMAL requirements of each position
- Supports core Human Resources functions by:

<b>Compensation Management</b>	Strengthening internal equity analyses, benchmarking and market pricing of jobs, other compensation analyses, and reporting
<b>Recruitment</b>	Ensuring that postings accurately reflect the position's accountabilities and requirements, and help identify the most qualified candidates
<b>Employee Development</b>	Allowing managers to create succession and professional development plans for their employees
<b>Performance Appraisals</b>	Facilitating a meaningful discussion of job performance in the context of each incumbent's position responsibilities, duties, and requirements
<b>HR Compliance</b>	Creating accurate, current descriptions of essential functions, requirements, and responsibilities for each position as required in order for Boston University to remain compliant with federal and state laws

## Why are PDQs important? *continued*

- BU is put at considerable risk if PDQs do not comply with ADA and FLSA legislation

Legislation	Importance for PDQs	Non-Compliance Implications
The Americans with Disabilities Act (ADA)	<ul style="list-style-type: none"> <li>• To comply with ADA, all PDQs must explicitly list all “essential functions” of each position and provide a basis for validating these as essential</li> </ul>	<ul style="list-style-type: none"> <li>• Non-compliance with either legislation results in exposure to lawsuits, back wages, penalties, and fines</li> <li>• FLSA non-compliance may result in U.S. Department of Labor (DOL) investigations potentially involving:                             <ul style="list-style-type: none"> <li>– Inspection of up to 3 years of pay records for any and all employees for each pay period</li> <li>– Employee interviews</li> <li>– Audit of facts, conditions, and practices to determine whether the institution has violated FLSA provisions</li> </ul> </li> </ul>
Fair Labor Standards Act (FLSA)	<ul style="list-style-type: none"> <li>• Information from the PDQ helps to determine whether a position is classified as “nonexempt” or “exempt” from the law</li> <li>• FLSA is a federal law governing minimum wage, overtime pay, child labor, and recordkeeping requirements</li> </ul>	

## Why a PDQ Tool?

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The PDQ Tool was developed in a format that:

- Is easy to complete by non-HR staff
- Is not highly dependent on individual writing styles
- Collects the same type of information for all positions in a clear, consistent format
- Can be used on an on-going basis

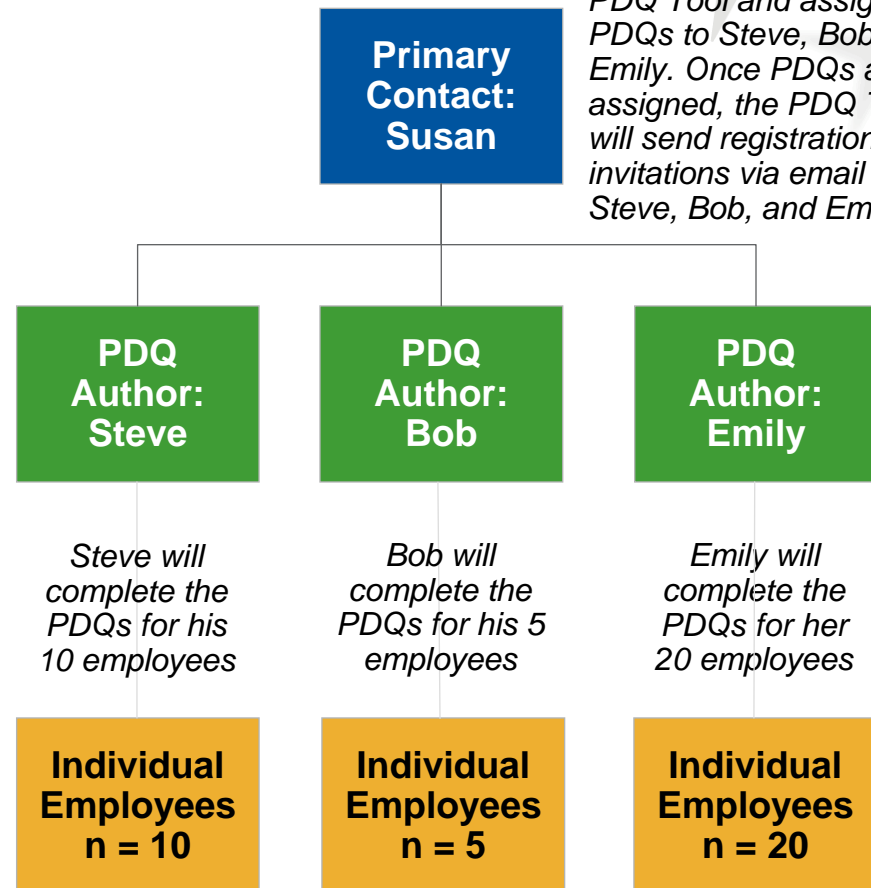
**The HRORP Team and Sibson consultants worked together to ensure that captured information is in the format required for SAP implementation**

# What are the various roles in writing PDQs?

- Primary contacts are responsible for ensuring that:
  - PDQs are complete and accurate before sending to the HRORP Team
  - Monitoring progress of PDQ completion status
  - Keep Leadership Updated
- PDQ Authors will draft PDQs and submit to the Primary Contact for approval, or the primary contact will write the PDQ and review with the PDQ Author
- PDQ Author will solicit information from individual employees as needed to ensure:
  - The PDQ accurately reflects the position's essential functions and requirements
  - The position's essential functions are consistent with the department's needs
- Individual employees will not be completing their own PDQs

## ILLUSTRATIVE EXAMPLE

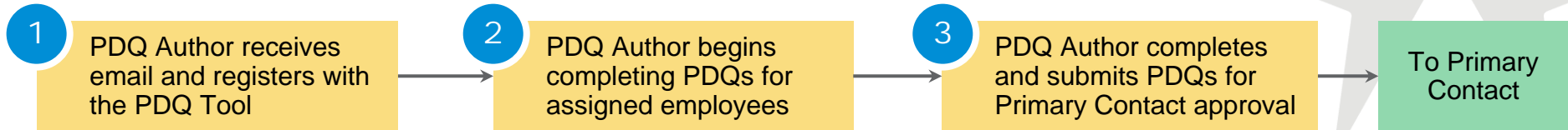
*Susan registers for the PDQ Tool and assigns PDQs to Steve, Bob, and Emily. Once PDQs are assigned, the PDQ Tool will send registration invitations via email to Steve, Bob, and Emily.*



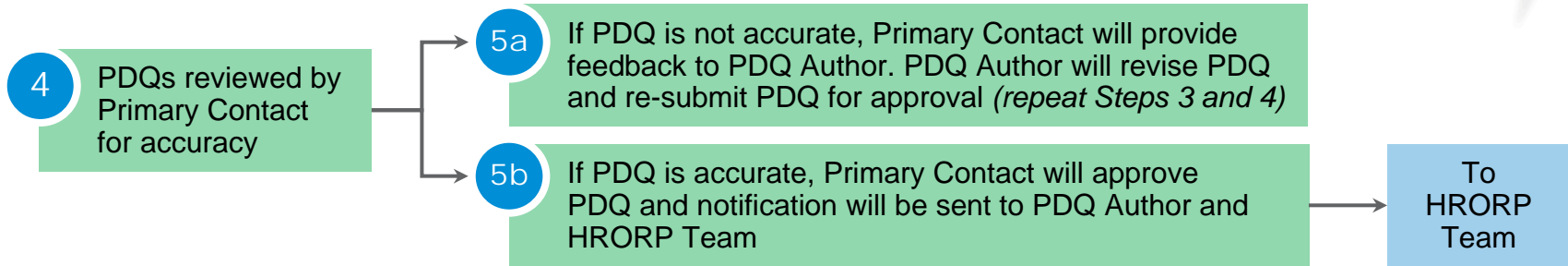


# PDQ Writing and Review Process

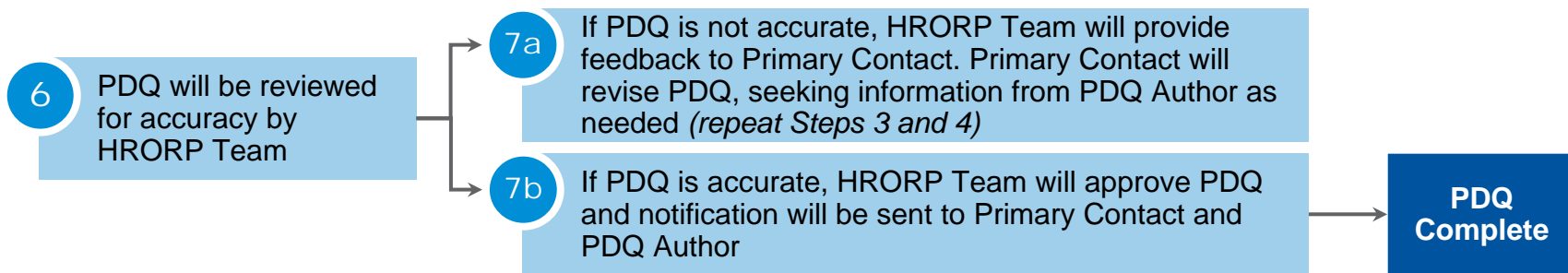
## PDQ Author Completes PDQ and Submits to Primary Contact



## Primary Contact Reviews PDQ Before Submitting to HRORP Team



## HRORP Team Approves PDQ



**PDQ information can be saved by hitting the “next/save” button at the bottom of each PDQ screen.**

# Registering and Logging on to the PDQ Tool

- Access the PDQ Tool through the link provided to you in an email from the HRORP Team
  - The email address in the 'From' line will appear as 'hrinfra@bu.edu'
- Log on by entering your email and temporary password
- You will be prompted to choose a new password

1. Enter BU email address and temporary password (from email)

## Position Description Questionnaire Registration

BU Email	<input type="text"/>
Temporary Password	<input type="text"/>

2. The First Name and Last Name will automatically appear when the email is entered

Please enter your telephone number and confirm that the below information matches correctly with your personal information. If it does not, please contact [hrinfra@bu.edu](mailto:hrinfra@bu.edu).

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
MI:	<input type="text"/>
Work Telephone Number:	<input type="text"/>

3. Enter work telephone number

You need to change the temporary password to something more recognizable for yourself.

Please choose a new password below.

New Password	<input type="text"/>
Confirm Password	<input type="text"/>

**Register**

4. Create new password, confirm new password, and click 'Register'

## Putting Your Team Together

### *Inviting PDQ Authors and Assigning PDQs to PDQ Authors*

Helps you select the PDQ Authors and assign PDQs to the PDQ Authors

- Assign a PDQ by selecting the 'Assign PDQs' option in the navigation bar
- Click on the unit and department drop down menus to select the specific combination of unit and department
  - All employees within that specific unit and department will appear at the bottom of the screen
- From the drop down on the far right, the Primary Contact selects the PDQ Author who will be completing the PDQ for the employee
- You will have the option to assign a PDQ one at a time (click on 'Assign only this PDQ') or assign all PDQs within a unit/department all at once (click on 'Assign All')
- After clicking either 'Assign only this PDQ' or 'Assign All', an email will be sent to the selected PDQ Author(s) who will be asked to register with the PDQ Tool to begin completing PDQs. PDQ Authors will only receive the registration email one time, upon being assigned their first PDQ.

# Putting Your Team Together

## Inviting PDQ Authors and Assigning PDQs to PDQ Authors



### Position Description Questionnaire

Navigation bar

PDQ Home | Admin Menu | **Assign PDQs** | Track PDQs | Logout

This page allows you to assign PDQs:

To assign a PDQ, please select the appropriate unit/department for that position and click 'Get Employees'. For each employee in that unit/department, you are responsible for choosing the appropriate PDQ Author from the drop-down list and clicking "Assign PDQ". You can assign PDQ Authors one at a time, or for an entire Unit/Department at once by clicking the button 'Assign All' at the bottom of the screen.

You have assigned PDQ Authors to 38 out of 99 PDQs.

Unit/Department:

Selection of the PDQ Author and assignment of the PDQs

All employees and positions in the selected unit and department combination

Employee Name	Position Number	Position Title	PDQ Author	
	0054049999	Director, Asst	<b>--- Select a PDQ Author ---</b>	Assign only this PDQ
	0057889999	Manager, Program	<b>--- Select a PDQ Author ---</b>	<b>Assign only this PDQ</b>

Option of assigning PDQ one at a time to the selected PDQ Author or assigning all PDQs to the selected authors all at once

## Adding Positions

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1. Primary Contacts will notify the HRORP Team (at [hrinfra@bu.edu](mailto:hrinfra@bu.edu)) of any positions that are not captured in the Tool (e.g., position in posting, recently vacated position)
2. The HRORP Team will add the position to the PDQ Tool
3. Once the HRORP Team adds the position, the PDQ Tool will automatically send an email to the Primary Contact with notification that the new position has been added

# Complying with Americans With Disabilities Act (ADA) by Defining “Essential Functions”

Provides information on why it is important to comply with the ADA when writing PDQs

- The first time you begin drafting a PDQ, you will need to read information about the ADA and the essential functions before you are allowed to move to the next screen
- If you would like to re-read the ADA and the essential functions, you can click on the link provided on PDQ Home to view and/or print this information



Please read the following information about the ADA and the essential functions. At the bottom of this page, you will be asked to acknowledge that you have read this page. This acknowledgement appears the first time you log onto the tool to complete the PDQ.

## THE AMERICANS WITH DISABILITIES ACT (ADA) DEFINING "ESSENTIAL FUNCTIONS"

A requirement under the Americans with Disabilities Act is that all job descriptions accurately define "essential functions" of each position and separate those functions from other marginal functions of that position. These "essential functions" must be identified in the official job description before the recruitment process may begin. The following is provided to assist managers in determining which functions should be designated as "essential" and which would be considered "marginal".

Under the ADA, essential functions are tasks that are fundamental and not marginal to the job. Essential functions are those that **must** be performed to accomplish the job, even if the manner in which those functions are performed or the equipment used in performing them is different for an employee with a disability than for other employees. Under EEOC regulations, employers may judge a particular function essential for the following reasons:

- The reason the position exists is to perform the function.
- The number of available employees to perform the function is limited (can not be transferred to another position).
- The function is so highly specialized that the incumbent is hired for his/her expertise or ability to perform the function.
- The amount of time spent performing the function.
- The consequences of not requiring the person to perform the function.
- The work experience of past employees in the job, or of current employees in similar jobs.



# Position Description Sections

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1. Background Information
2. Position Summary
3. Essential Functions
4. Reporting Relationships
5. Supervisory Responsibilities
6. Budget Responsibilities
7. Decision Making
8. Independence of Action
9. Education
10. Work Experience
11. Skills
12. Physical/Environmental Demands
13. Job Groupings
14. Additional Information

# 1. Background Information

Provides important position identifying information for each PDQ

1. Enter the position number of the individual to whom the position reports to (*Reports to Position #1*) (refer to list of employees and positions on the disc provided to you by the HRORP Team). Important Note for BUMC: Until position numbers are assigned to all individuals, please enter "BUMC mail code, dash, the last 4 digits of the employee's ID number" in the Positions # field below. e.g., MED00-1234
2. Select appropriate live-in code (yes or no)
3. All other fields are automatically filled in by the PDQ Tool

## CRC Example

This PDQ is for position # 9432509998 - Specialist, Env Mgmt

[Print Version of PDQ](#)

Page 1 of 7

*Important Note for BUMC:* Until position numbers are assigned to all individuals, please enter "BUMC mail code, dash, the last 4 digits of the employee's ID number" in the Positions # field below. E.g., MED00-1234.

Enter the position number of the individual to whom the position reports next to the box labeled 'Reports to Position #1'. If the position reports to two individuals, enter the second position number next to the box labeled 'Reports to Position #2 (if applicable)'. Select appropriate live-in code (yes or no).

Position Number:	9432509998	Job Code:	
Position Title:	Specialist, Env Mgmt	Salary Grade:	73
Unit #/Name:	004 - General Educational Support	FLSA Status:	EX
Dept #/Name:	511 - Environmental Management	Union Status:	NREP
Reports to Position #1:	<input type="text" value="9926369999"/>	BU Job Group:	
Reports to Position Name (1):	Manager, Env Mgmt	Federal Job Code:	305
Reports to Position #2 (if applicable):	<input type="text"/>	HR Approved By:	
Reports to Position Name (2):		HR Date Approved:	
BUMC Mail Code (if applicable):			
Live-In Code:	<input type="text" value="---( Select value )---"/>		
Written By:			
Date Written or Revised:			
Department Approved By:			
Department Date Approved:			

## BUMC Example

This PDQ is for position # MED31-3996 -Research Technician

[Print Version of PDQ](#)

Page 1 of 7

*Important Note for BUMC:* Until position numbers are assigned to all individuals, please enter "BUMC mail code, dash, the last 4 digits of the employee's ID number" in the Position # field below. E.g., MED00-1234.

Enter the position number of the individual to whom the position reports next to the box labeled "Reports to Position #1." If the position reports to two individuals, enter the second position number next to the box labeled "Reports to Position #2 (if applicable)." Select appropriate live-in code (yes or no).

Position Number:	MED31-3996	Job Code:	
Position Title:	Research Technician	Salary Grade:	24
Unit #/Name:	057 -School Of Medicine(Med)	FLSA Status:	NE
Dept #/Name:	211 -Bs--Pharmacology & Exp Therapy	Union Status:	NREP
Reports to Position #:	<input type="text" value="ME DBL-3264"/>	BU Job Group:	
Reports to Position Name (1):	Administrator, Ocr	Federal Job Code:	506
Reports to Position #2 (if applicable):	<input type="text"/>	HR Approved By:	
Reports to Position Name (2):		HR Date Approved:	
BUMC Mail Code (if applicable):	MED 3996		
Live-In Code:	<input type="text" value="---( Select value )---"/>		
Written By:			
Date Written or Revised:			
Department Approved By:			
Department Date Approved:			



## 2. Position Summary

Provides a brief overview of the position's primary purpose

- This is a brief summary of the position's responsibilities at BU
  - Think of this as the 'elevator summary'
    - You meet an old friend in an elevator. How would you describe your position in such a brief time?
  - Sometimes this is easier to draft after you have finished the rest of the PDQ

**Position Summary :** In 3-4 sentences, briefly but specifically, summarize the primary purpose of the position.

### 3. Essential Functions

Forms the basis for employee and manager expectations for accomplishments and performance; is considered the most important section of the PDQ Tool

- **Essential Functions** are those major on-going responsibilities/end results that must be achieved in the position
  - Describe up to 6 major responsibilities (not tasks) the position must achieve
  - Write statements so someone unfamiliar with the position can understand what the position does
  - Describe expectations for results as well as related activities
- *Instructions and helpful tips on writing essential functions will be addressed after we have finished reviewing the PDQ Tool*

**Essential Functions:** List up to **six essential functions** of the position in the space provided below, indicating the **most important** first, and the approximate percentage of time spent on each function over the course of a year. **DO NOT** list any duties or responsibilities that require less than 5% of the position's time. Total must add up to 100%.

Current % of Time: 100%

Function Name	% Of Time		
function 1	60	Update	Delete
function 2	40	Update	Delete

Function  
Description



% of  
Time

## 4. Reporting Relationships

Identifies the position # and titles from whom the position receives substantial work assignments (in addition to direct manager) and to whom the position assigns work

### ➤ Who assigns work to the position?

- Check the box if no other manager, aside from the position's primary manager, assigns substantial work to this position
- Otherwise, type in the position number(s) for others who may assign work directly to the position
  - For example, a Department Coordinator in Biology may also receive work from all department faculty. In this case, enter the position number for the Biology Professors for whom the Department Coordinator receives work

### ➤ Which positions report directly to this position?

- Check the box if the position does not have any direct reports
- Otherwise, type in the position number(s) of the direct reports to this position
- If the position oversees student workers, type in the number of student workers in the space provided

*Important Note for BUMC: Until position numbers are assigned to all individuals, please enter "BUMC mail code, dash, the last 4 digits of the employee's ID number" in the Positions # field below. E.g., MED00-1234.*

If this position regularly receives work assignments directly from others, in addition to the manager, list those position titles and position numbers of individuals below. **Please see important note at the top of page.**

No other manager(s) assigns substantial work to this position.

Position Title(s) and Number(s) who Assign Work to This Position

Position No.	Position Title	
0045199997	Manager, Human Sciences Inst	Delete

Position No.

Position Title:

**Add Work Assign By Position**

*Important Note for BUMC: Until position numbers are assigned to all individuals, please enter "BUMC mail code, dash, the last 4 digits of the employee's ID number" in the Positions # field below. E.g., MED00-1234.*

Position Title(s) and Number(s) Of Directs Reports to This Position. **Please see important note at the top of page.**

Position does not have any direct reports

Direct Reports to This Position

Position No.

Position Title:

**Add Reports to This Position**

Number of student workers the position oversees

## 5. Supervisory Responsibilities

Identifies the different types of supervisory responsibilities of the position

- If the position does not have supervisory responsibilities, select the first box
- Otherwise, read the selections and select all those that apply

### Directing/Supervising Work Of Others

Check the following tasks if applicable:

- Position does not have supervisory responsibilities
- Determines work methods (How to perform a task)
- Plans work operations (What tasks to perform)
- Interviews/selects employees or
- Interviews and makes effective recommendations
- Disciplines employees
- Evaluates employee performance
- Resolves employee grievances
- Provides employee training
- Provides indirect supervision/functional guidance

## 6. Budget Responsibilities

Identifies the different types of budget responsibilities of the position

- If the position does not have budget responsibilities, select the first box
- Otherwise, read the selections and select all those that apply; enter dollar amounts where applicable

**Budget Responsibility: Check the item(s) below which best describe the incumbent's involvement in the budgetary process.**

Position does not have budget responsibilities

Planning and Preparation

Forecasting

Maintaining and Monitoring

Does the incumbent have signature authority?

If yes, please provide dollar amount:

Budget amount for which incumbent has primary responsibility (include grants, if applicable):

## 7. Decision Making

Indicates the impact of this position's typical decisions on the institution

**Decision Making: Indicate the type of impact of the decisions typically made by this position. Only make one selection.**

- Decisions generally affect own job or specific functional area.
- Decisions may affect a work unit or area within a department. May contribute to business and operational decisions that affect the department.
- Decisions have major implications on the management and operations of an area within a department. Job may contribute to important strategy, operational and business decisions that affect the department.
- Decisions have significant, broad implications for the management and operations of a division. Job contributes to decisions on the overall strategy and direction of The University.

Provide additional information if desired:

## 8. Independence of Action

Indicates the level of independence this position has in conducting work

**Independence of Action: Indicate the position's general degree of independence of action. Only make one selection.**

- Work is closely monitored by supervisor/manager; detailed instructions and procedures are generally provided.
- Work progress is monitored by supervisor/manager; incumbent follows precedents and procedures, and may set priorities and organizes work within general guidelines established by supervisor/manager.
- Results are defined and existing practices are used as guidelines to determine specific work methods and carries out work activities independently; supervisor/manager is available to resolve problems.
- Results are defined; incumbent sets own goals and determines how to accomplish results with few or no guidelines to follow, although precedents may exist; supervisor/manager provides broad guidance and overall direction.

Provide additional information if desired:

## 9. Education

Describes the **MINIMAL** level of required and preferred education necessary to handle the position's essential functions

- Indicate required and preferred (if applicable) education level, field of study, certificate/license, or professional designation
  - Requirements/preferences may not reflect current incumbent's education
- If experience can substitute for education, check and describe
  - For example: "Bachelors Degree, plus one year's related experience, OR High School diploma plus four years related experience"

Education: Select the MINIMAL level of required and preferred education necessary to effectively handle the position's essential functions.

Required:

Preferred:

Check here if experience may substitute for some of the above education and describe how below

Additional information (such as specific degree, licensure, certifications, valid Driver's License, etc):

Education: Select the MINIMAL level of required and preferred education necessary to effectively handle the position's essential functions.

Required:

Preferred:

Check here if experience may substitute for some of the above education and describe how below

Additional information (such as specific degree, licensure, certifications, valid Driver's License, etc):

- ( Choose a value )---
- ( Choose a value )---
- High school diploma or GED
- Vocational or technical training
- Associate's degree, or vocational or technical sch
- Bachelor's degree
- Master's degree
- Doctoral degree



# 10. Work Experience

Describes the **MINIMAL** level of work experience required to perform the position's responsibilities

- Select the work experience level that best describes the amount of related experience required
  - This may or may not be the same as the incumbent's experience

Work Experience: Indicate the MINIMAL level of work related experience required to effectively perform the position's responsibilities. This is not necessarily the same as the incumbent's experience.

---( Choose Work Experience )--- Other:

Add any comments for the section above.

Work Experience: Indicate the MINIMAL level of work related experience required to effectively perform the position's responsibilities. This is not necessarily the same as the incumbent's experience.

---( Choose Work Experience )--- Other:

---( Choose Work Experience )---  
Less than 12 months  
**1 - 3 years**  
3 - 5 years  
5 - 8 years  
More than 8 years

section above.

# 11. Skills

Describes the type and level of skills required to perform the position's responsibilities

- Indicate which types of skills are required and indicate general level of expertise required (Basic, Intermediate, or Advanced)
  - Not all skills will apply to all positions
- Add other skill types not listed, as applicable
- Click on the skill to view the skill definition. The detailed instructions guide will also contain the definitions of all the skills and levels provided in this section

**Skills: Describe the type and level of skills required to handle the position's responsibilities.**

Basic	Applies the fundamental skills necessary for position
Intermediate	Applies some advanced skills that allow employee to adapt and meet some complex or non-routine situations
Advanced	Applies highly proficient and specialized skills that allow employee to function in situations that are varied, complex, and/or non-routine

Analytical	---( Choose a value )---
Project/Process Management	---( Choose a value )---
Computer/Technical	---( Choose a value )---
Office/Administrative Support <a href="#">View Definition</a>	---( Choose a value )---
Equipment Operation	---( Choose a value )---
Written and Oral Communications	---( Choose a value )---
Other:	<input type="text"/>



# 12. Physical/Environmental Demands

Describes the typical physical and/or environmental demands required to perform the position's responsibilities

- Select the appropriate response to indicate whether the position has any physical or environmental demands. If you select 'Yes' to the question, you will be allowed to select the prevalence of all physical and environmental demands respectively

Physical/Environmental Demands: Indicate the typical physical and/or environmental demands required to effectively handle the position's responsibilities and their frequency.

Does the position have any physical demands? Yes

Does the position have any environmental demands? Yes

Physical Demands		Environmental Demands	
Vision and hearing abilities	---( Choose a value )---	Exposure to all weather conditions	---( Choose a value )---
Heavy lifting, carrying, etc.	---( Choose a value )---	Radiation	---( Choose a value )---
Extensive standing, walking, etc.	---( Choose a value )---	Carcinogens	NA Often Rarely Sometimes
Describe any unusual situations:		Lasers	---( Choose a value )---
		Animal Contact	---( Choose a value )---
		Patient Care/Contact	---( Choose a value )---
		Infective Agent	---( Choose a value )---
		Toxic Chemicals	---( Choose a value )---
		Recombinant DNA	---( Choose a value )---
		Reproductive Toxins	---( Choose a value )---
		Human/Animal Tissue/Fluid	---( Choose a value )---
		Other:	



## 13. Job Groupings

Reflects a macro categorization of positions to help the HRORP Team and Sibson group positions.

- If you are unsure what job grouping you need to choose, please select 'Other' and describe
- A list of the job groupings (truncated list) is below:

Job Groupings: Select the appropriate job group for this position. Only make one selection. A job group reflects a macro categorization of positions to help the HRORP team and Sibson group positions. If you are unsure of what job group you should choose, please describe in the box labeled "Other".

- |  |  |
|--|--|
| <input type="radio"/> Academic Counseling    | <input type="radio"/> International/Study Abroad |
| <input type="radio"/> Accounting             | <input type="radio"/> Laboratory Support         |
| <input type="radio"/> Administrative Support | <input type="radio"/> Legal                      |
| <input checked="" type="radio"/> Admissions  | <input type="radio"/> Library                    |
| <input type="radio"/> Archiving/Art          | <input type="radio"/> Mail Services              |
| <input type="radio"/> Athletics              | <input type="radio"/> Maintenance                |

Other

## 14. Additional Information

Allows you to add pertinent, related information about the position to fully understand the role, responsibilities, nature, and scope of position (not captured in any of the previous sections)

- Examples of additional information include: unusual circumstances, cyclical, or anything else to help the reader understand the position better
- You can also print the PDQ by clicking on 'Print Version of PDQ'

**Additional Information:** Please describe as clearly and concisely as possible any additional information that would be important to fully understand the role, responsibilities, nature and scope of the position.

The statements in this position description are intended to describe the general nature and level of work being executed by employee(s) assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties and skills required of the position or individuals.

**Reviewer's Comments:**

<< Previous

Save current page

Submit PDQ

## Tracking, Viewing, and Re-assigning PDQs

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- Select the 'Track PDQs' option in the navigation bar
- The 'PDQ Status' column provides the status of the PDQ
  1. Start PDQ
  2. PDQ in Draft
  3. Submitted for PC review
  4. Send back to PDQ Author for revision
  5. Submitted for HRORP review
  6. Send back to PC for revision
  7. Approved by HRORP
- Click on the Status to view, edit, and print the PDQ
- If there is a need to re-assign a position to another PDQ Author, click 'Re-assign PDQ'

# Tracking, Viewing, and Re-assigning PDQs



## Position Description Questionnaire

Navigation bar

PDQ Home | Admin Menu | Assign PDQs | **Track PDQs** | Logout

Below are listed the PDQs you have assigned to yourself as the Primary Contact. If you need to re-assign a PDQ, please select the appropriate PDQ Author from the drop down and click "Re-assign PDQ". If you would like to copy the information in 1 PDQ to another PDQ, select "Copy PDQ" for the position you would like to copy, and then select the appropriate position from the drop down list.

Employee Name	Emp Unit/Dept	Position No.	Position Title	PDQ Author	PDQ Status	Re-Assign PDQ	Copy PDQ
	004/512	5554329998	Coordinator, Compliance Prog		Start PDQ	Re-assign PDQ	Copy PDQ
	046/380	0423749999	Coordinator, Rsrch Initiatives		Start PDQ	Re-assign PDQ	Copy PDQ
	004/516	7628939998	Specialist, Sr, Rad Safety		Start PDQ	Re-assign PDQ	Copy PDQ
	004/510	0064759996	Analyst I, Sys Applications		PDQ in Draft	Re-assign PDQ	Copy PDQ
	004/517	9286109999	Specialist, Sr, Research Safe		Start PDQ	Re-assign PDQ	Copy PDQ

List of employees for whom the Primary Contact will complete a PDQ

Ability to re-assign the PDQ for another PDQ Author to complete

Below is listed the PDQ Author that has been assigned to each PDQ. If you need to re-assign a PDQ, please select the appropriate PDQ Author from the drop down and click "Re-assign PDQ". If you would like to copy the information in 1 PDQ to another PDQ, select "Copy PDQ" for the position you would like to copy, and then select the appropriate position from the drop down list.

Employee Name	Emp Unit/Dept	Position No.	Position Title	PDQ Author	PDQ Status	Re-Assign PDQ	Copy PDQ
	004/513	9348609999	Coordinator, Staff		Start PDQ	Re-assign PDQ	Copy PDQ
	004/510	9977169999	Administrator, Financial		Start PDQ	Re-assign PDQ	Copy PDQ
	004/512	9436669999	Coordinator, Compliance		PDQ in Draft	Re-assign PDQ	Copy PDQ
	004/515	9804329999	Specialist, Sr, Industrial Hyg		Start PDQ	Re-assign PDQ	Copy PDQ

List of employees for whom the Primary Contact has assigned a PDQ Author



# Sample Report from PDQ Tool

## ILLUSTRATIVE EXAMPLE OF REPORT STATISTICS

<b>PDQ Author (John Smith)</b>								
	<u>Need to Start PQQ</u>	<u>PDQs in Draft</u>	<u>Submitted for PC Review</u>	<u>Sent Back to PDQ Author</u>	<u>Submitted for HRORP Review</u>	<u>Sent Back to Primary Contact</u>	<u>Approved by HRORP</u>	<u>Total PDQs</u>
Number	6	4	3	1	2	1	3	20
% Total	30%	20%	15%	5%	10%	5%	15%	100%
Truncated List of 20 Shown Below (Tool Will Show Full List)								
Employee Name	Position No.	Unit/Dept (Illustrative)	Position Title	PDQ Author	PDQ Status			
John Doe	9148169999	323/001	Secretary, Sr, Admin	John Smith	Submitted for HRORP Review			
Susan White	51469998	206/030	Director, Lacf	John Smith	Approved by HRORP			
Mike Adams	8714429999	195/004	Director, Content Dev	John Smith	Sent Back to Primary Contact			
Tom Taylor	7628939998	123/001	Specialist, Sr, Rad Safety	John Smith	Sent Back to PDQ Author			

<b>Primary Contact (Sarah Brown)</b>								
<u>Assigned To (Number)</u>	<u>Need to Start PQQ</u>	<u>PDQs in Draft</u>	<u>Submitted for PC Review</u>	<u>Sent Back to PDQ Author</u>	<u>Submitted for HRORP Review</u>	<u>Sent Back to Primary Contact</u>	<u>Approved by HRORP</u>	<u>Total PDQs</u>
John Smith	6	4	3	1	2	1	3	20
Jane Doe	9	1						10
Chris Johnson		2		1	1		11	15
Kristen Thomas	2	1			2			5
<b>Total</b>	<b>17</b>	<b>8</b>	<b>3</b>	<b>2</b>	<b>5</b>	<b>1</b>	<b>14</b>	<b>50</b>
Assigned To (% Total)								
	30%	20%	15%	5%	10%	5%	15%	100%
	90%	10%	0%	0%	0%	0%	0%	100%
	0%	13%	0%	7%	7%	0%	73%	100%
	40%	20%	0%	0%	40%	0%	0%	100%
<b>Total</b>	<b>34%</b>	<b>16%</b>	<b>6%</b>	<b>4%</b>	<b>10%</b>	<b>2%</b>	<b>28%</b>	<b>100%</b>



# Copying PDQs to Another PDQ

- The Copy Function is located on the 'Track PDQs' Page
- Click 'Copy PDQ' for the PDQ you would like to copy. You will be able to copy a PDQ that is draft form or one that has been fully completed.
- Select the position you would like to receive the copy from the drop down list labeled 'To This Position' and click on the button 'Copy PDQ'

## Step 1

**Position Description Questionnaire** 

PDQ Home | Admin Menu | Assign PDQs | **Track PDQs** | Logout

Below are listed the PDQs you have assigned to yourself as the Primary Contact. If you need to re-assign a PDQ, please select the appropriate PDQ Author from the drop down and click "Re-assign PDQ". If you would like to copy the information in 1 PDQ to another PDQ, select "Copy PDQ" for the position you would like to copy, and then select the appropriate position from the drop down list.

Employee Name	Emp Unit/Dept	Position No.	Position Title	PDQ Author	PDQ Status	Re-Assign PDQ	Copy PDQ
	004/512	5554329998	Coordinator, Compliance Prog		Start PDQ	Re-assign PDQ	Copy PDQ
	046/380	0423749999	Coordinator, Rsrch Initiatives		Start PDQ	Re-assign PDQ	Copy PDQ
	004/516	7628939998	Specialist, Sr, Rad Safety		Start PDQ	Re-assign PDQ	Copy PDQ
	004/510	0064759996	Analyst I, Sys Applications		PDQ in Draft	Re-assign PDQ	Copy PDQ
	004/517	9286109999	Specialist, Sr, Research Safe		Start PDQ	Re-assign PDQ	Copy PDQ

Below is listed the PDQ Author that has been assigned to each PDQ. If you need to re-assign a PDQ, please select the appropriate PDQ Author from the drop down and click "Re-assign PDQ". If you would like to copy the information in 1 PDQ to another PDQ, select "Copy PDQ" for the position you would like to copy, and then select the appropriate position from the drop down list.

Employee Name	Emp Unit/Dept	Position No.	Position Title	PDQ Author	PDQ Status	Re-Assign PDQ	Copy PDQ
	004/513	9348609999	Coordinator, Staff		Start PDQ	Re-assign PDQ	Copy PDQ
	004/510	9977169999	Administrator, Financial		Start PDQ	Re-assign PDQ	Copy PDQ
	004/512	9436669999	Coordinator, Compliance		PDQ in Draft	Re-assign PDQ	Copy PDQ

*Ability to copy information from one PDQ to another PDQ*

## Step 2

**Position Description Questionnaire** 

PDQ Home | Admin Menu | Assign PDQs | Track PDQs | Logout

### Copy the below PDQ

Position Number:	5554329998	Job Code:	
Position Title:	Coordinator, Compliance Prog	Salary Grade:	73
Unit #/Name:	004 - General Educational Support	FLSA Status:	EX
Dept #/Name:	512 - Tech Committees, Research Compl	Union Status:	NREP
Reports to Position #1:	9436669999	BU Job Group:	
Reports to Position Name (1):	Coordinator, Compliance	Federal Job Code:	306
Reports to Position #2:			
Reports to Position Name (2):			
BUMC Mail Code (if applicable):			
Live-In Code:	1		

**To this position**

0059789998 - Manager, Asst, Lacf

**Copy PDQ**

## Detailed Information on Essential Functions Section

- Now let's return to the **Essential Functions** (Section 3) of the PDQ
- This is the heart of the PDQ as it outlines what the position is ultimately accountable for—**what, how, and why**

### Example

- These were Essential Function statements of position descriptions at another institution
- What do the phrases mean to you?



## Detailed Information on Essential Functions Section *continued*

### DESCRIBING ESSENTIAL FUNCTIONS CLEARLY

Use the following pattern to write an Essential Functions statement:

Action Word

+

Subject

+

Activities

For example:

Action Word

Subject

Helps students and parents with the financial aid application process by holding information sessions and webinars.

Activities

## Detailed Information on Essential Functions Section *continued*

### DESCRIBING ESSENTIAL FUNCTIONS CLEARLY *ADDITIONAL EXAMPLES*

- **Identifies prospective major gift donors for the University by:**
  - Cultivating potential new donors from prospect pool of alumni, friends, and family
  - Attending alumni functions including dinners, receptions, and other special events
  
- **Provides technical IT support to the University by:**
  - Responding to telephone calls, email, and personnel requests for technical help
  - Troubleshooting user computer problems by documenting, tracking, and monitoring the problem to ensure a timely resolution

## Detailed Information on Essential Functions Section *continued*

Use the Essential Functions Worksheet to help you organize your thoughts when writing the PDQs for your unit/department

### Essential Functions Worksheet Steps

1. List activities, duties, and tasks in the 'Duties and Tasks' column
2. Cluster related activities together under the 'Related Groupings' column
  - a. Eliminate duplicates
  - b. Clarify language
  - c. Delete extraneous statements
3. Review each grouping to develop an Essential Functions statement
  - a. What is the position responsible for?
  - b. How do these activities support that responsibility?

# Essential Functions Worksheet

**Position Title:** Administrative Assistant

Duties and Tasks	Related Groupings	Essential Function Statement
<ul style="list-style-type: none"> <li>• Prepare and plan for meetings and conferences</li> <li>• Secure space for meetings and conferences</li> <li>• Order office supplies</li> <li>• Maintain inventory of office supplies</li> <li>• Prepare requisitions for special orders of supplies</li> <li>• Inform meeting participants of meeting location and time</li> <li>• Distribute agendas</li> <li>• Track department budget</li> <li>• Draft and type correspondence</li> <li>• Make travel arrangements</li> <li>• Schedule meetings</li> <li>• Run reports</li> </ul>	<div style="background-color: #f4a460; padding: 10px; border: 1px solid black;"> <p>As you read this list, it is hard to determine what this position is really responsible for accomplishing</p> </div>	
<ul style="list-style-type: none"> <li>• File paperwork</li> <li>• Charge cost of supplies to departments</li> <li>• Work with vendors</li> </ul>		

# Essential Functions Worksheet *continued*



**Position Title:** Administrative Assistant

Duties and Tasks	Related Groupings	Essential Functions Statement
<ul style="list-style-type: none"> <li>• Prepare and plan for meetings and conferences</li> <li>• Secure space for meetings and conferences</li> <li>• Order office supplies</li> <li>• Maintain inventory of office supplies</li> <li>• Prepare requisitions for special orders of supplies</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare and plan for meetings and conferences</li> <li>• Secure space for meetings and conferences</li> <li>• Inform meeting participants of meeting location and time</li> <li>• Distribute agendas</li> <li>• Work with vendors</li> <li>• Schedule meetings</li> </ul>	
<ul style="list-style-type: none"> <li>• Inform meeting participants of meeting location and time</li> <li>• Distribute agendas</li> <li>• Track department budget</li> <li>• Draft and type correspondence</li> <li>• Make travel arrangements</li> <li>• Schedule meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Order office supplies</li> <li>• Maintain inventory of office supplies</li> <li>• Charge cost of supplies to departments</li> <li>• Prepare requisitions for special orders of supplies</li> </ul>	
<ul style="list-style-type: none"> <li>• Run reports</li> <li>• File paperwork</li> <li>• Charge cost of supplies to departments</li> <li>• Work with vendors</li> </ul>	<ul style="list-style-type: none"> <li>• Track department budget</li> <li>• Draft and type correspondence</li> <li>• Make travel arrangements</li> <li>• Run reports</li> <li>• File paperwork</li> </ul>	

# Essential Functions Worksheet *continued*

**Position Title:** Administrative Assistant

Duties and Tasks	Related Groupings	Essential Functions Statement
<ul style="list-style-type: none"> <li>• Prepare and plan for meetings and conferences</li> <li>• Secure space for meetings and conferences</li> <li>• Order office supplies</li> <li>• Maintain inventory of office supplies</li> <li>• Prepare requisitions for special orders of supplies</li> <li>• Inform meeting participants of meeting location and time</li> <li>• Distribute agendas</li> <li>• Track department budget</li> <li>• Draft and type correspondence</li> <li>• Make travel arrangements</li> <li>• Schedule meetings</li> <li>• Run reports</li> <li>• File paperwork</li> <li>• Charge cost of supplies to departments</li> <li>• Work with vendors</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare and plan for meetings and conferences</li> <li>• Secure space for meetings and conferences</li> <li>• Inform meeting participants of meeting location and time</li> <li>• Distribute agendas</li> <li>• Work with vendors</li> <li>• Schedule meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Coordinate all aspects of meetings and conferences by:               <ul style="list-style-type: none"> <li>– Scheduling meetings and conferences and informing participants of location and time</li> <li>– Securing space and working with vendors to set up meetings and conferences</li> <li>– Sending soft-copy agendas to participants before the meeting and distributing hard copies during the meeting</li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>• Order office supplies</li> <li>• Maintain inventory of office supplies</li> <li>• Charge cost of supplies to departments</li> <li>• Prepare requisitions for special orders of supplies</li> </ul>	<ul style="list-style-type: none"> <li>• Maintain office supplies inventory by:               <ul style="list-style-type: none"> <li>– Monitoring supply inventory and replenishing as necessary</li> <li>– Preparing requisitions for special orders</li> <li>– Charging cost of supplies to appropriate departments</li> </ul> </li> </ul>
	<ul style="list-style-type: none"> <li>• Track department budget</li> <li>• Draft and type correspondence</li> <li>• Make travel arrangements</li> <li>• Run reports</li> <li>• File paperwork</li> </ul>	<ul style="list-style-type: none"> <li>• Perform administrative and secretarial support for the department, including:               <ul style="list-style-type: none"> <li>– Tracking department budget and running reports</li> <li>– Making travel arrangements</li> <li>– Filing</li> <li>– Drafting and typing correspondence</li> </ul> </li> </ul>



# Important Considerations

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- Describe the position, not the person
- Describe the **MINIMAL** requirements for the position
- Describe the current position content, not anticipated changes or outdated functions no longer in use
  - Only changes occurring now should be captured on the PDQ
- Avoid jargon, spell out acronyms, and define technical terms (when necessary)
- Use position titles or roles when referring to others at BU
  - Use names of people only when specifically requested
- For hybrid positions, complete one PDQ that reflects the position responsibilities
- Entries do not correlate with numeric values or points (BU is moving away from Hay Point Factor job evaluation system)

# PDQ Resource Materials

➤ Refer to HRORP website for the following PDQ resource materials

Resource	Location
1. Link to access the PDQ Tool	HRORP - PDQ Tool Page
2. Training Session PowerPoint Presentation	HRORP - PDQ Tool Page
3. Video of training session	HRORP - PDQ Tool Page
4. Detailed Instructions Guide	HRORP - PDQ Tool Page
5. PDQ Self-Training Tool	HRORP - PDQ Tool Page
6. Glossary of Terms	HRORP - PDQ Tool Page
7. Essential Functions Worksheet	HRORP - PDQ Tool Page
8. List of Action Words	HRORP - PDQ Tool Page
9. Definitions of PDQ Skills and Levels	HRORP - PDQ Tool Page
10. Illustrative Examples of Administrative Support Responsibilities and Duties	HRORP - PDQ Tool Page
11. PDQ FAQs	HRORP - PDQ Tool Page
12. HRORP FAQs	HRORP Home Page
13. Compensation FAQs	HRORP Home Page

## Next Steps

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- Contact the HRORP Team at [hinfra@bu.edu](mailto:hinfra@bu.edu) if:
  - You have not received your Packet from HRORP by Wednesday, April 14<sup>th</sup>
- Assign PDQs to PDQ Authors
- PDQ Authors will draft PDQs, soliciting information from individual employees as needed
- Primary Contacts will receive email notification once PDQ Authors have submitted PDQs for review
- Primary Contacts should review and provide any relevant feedback to PDQ Author
- Primary Contacts should ensure any necessary clarifications are made before submitting PDQs to the HRORP Team by **Friday, May 21st**

**The HRORP Team is available to provide guidance throughout this process. Email [hinfra@bu.edu](mailto:hinfra@bu.edu) if you have any questions or need assistance.**