

# 2 Job Evaluation

## 210 General Information

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### 211 Purpose

This chapter:

- a. Describes the handbooks and forms used in the job evaluation process.
- b. Outlines the procedures used to request a job evaluation review.
- c. Details the process used to review and update job descriptions used throughout the Postal Service.

### 212 Responsibilities

#### 212.1 SAPMG, Human Resources Group

The Senior Assistant Postmaster General, Human Resources Group, is responsible for ensuring:

- a. That each position in the Postal Service is evaluated and placed in an appropriate salary grade.
- b. That postal employees receive equal pay for substantially equal work.

#### 212.2 Office of Organizational Requirements, Human Resources Group

This office:

- 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 (RFR) and furnishes information to the Special Review Panel upon request.
- g. Reviews all requests submitted by Headquarters and regional units.

212.3 **Field Divisions**

The field division 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 the Office of Organizational Requirements for review.

212.4 **Reviewing Offices**

Each reviewing office (e.g., BMC, MSC or Headquarters management unit):

- a. Reviews requests for job evaluation action.
- b. Submits comments and recommendations on the validity of the requests.

212.5 **Initiating Offices**

Initiating offices (e.g., Headquarters, field divisions, MSCs and associate offices):

- a. Rank authorized bargaining unit positions within their delegated authority.
- b. Prepare requests to rank bargaining unit positions which cannot be matched to key or standard position descriptions within their delegated authority.
- c. Prepare requests for job evaluation action on nonbargaining unit positions.

213 **Management Levels of Review**

For the purpose of this chapter, management levels of review are defined as follows:

<b>Initiating or Reviewing Office</b>	<b>Next Management Level of Review</b>
Associate Office	MSC
MSC	Field Division
Field Division	Office of Organizational Requirements

214 **Handbooks**

214.1 **Bargaining Job Descriptions**

Handbook P-1 (future EL 201), *Position Descriptions, Bargaining Unit Positions*, contains job descriptions for high incumbency bargaining-unit jobs used at the Field Division level and below.

214.2 **Nonbargaining Job Descriptions**

Handbook EL-202 (formerly P-4), *Standard Position Descriptions*, contains job descriptions for most high incumbency nonbargaining jobs used at the Field Division level and below.

214.3 **Availability**

Both of these handbooks are available to field divisions, MSCs, and large associate offices from the Headquarters Office of Organizational Requirements. Job descriptions not contained in these two handbooks also may be obtained from the Office of Organizational Requirements or, for Headquarters positions only, from the Headquarters Personnel Division.

215 **Forms**

215.1 **Form 6802**

Form 6802, *Request for Job Evaluation Action*, is used to establish a new job or to revise an existing job, and can be obtained from the Office of Organizational Requirements (Exhibit 215.1).

215.2 **Form 820**

Form 820, *Ranking of Position Request*, is used to establish and review the ranking of bargaining unit positions located in the field and at certain regional and Headquarters units (Exhibit 215.2). These forms may be obtained from the area supply centers.

216 **Maintenance of Position Descriptions**

216.1 **Headquarters (Office of Organizational Requirements)**

A master file of all job descriptions for bargaining unit and nonbargaining unit positions is maintained by the Office of Organizational Requirements at Headquarters.

216.2 **Field Divisions**

Field divisions, MSCs and associate offices maintain job descriptions for the MSC and associate office positions within their jurisdictions which are not included in the handbooks.

216.3 **Updating Handbooks and Files**

Whenever a new job description is developed, or an existing job description is revised, the Office of Organizational Requirements sends one copy to each installation that maintains the handbook or file in which the copy should be placed.

217 **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.











Exhibit 215.2 (p. 2)  
**Form 820, Ranking of Position Request**

<b>6. Evaluation Report</b>					
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 <i>(Compare the position for which a ranking is requested against the comparison position by entering a check in the appropriate column for each component.)</i>					
<b>Descriptive Comparison</b> <i>(Components of New Position)</i>	<b>Rank in Relation to Comparison Position</b>				
	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.					
<b>7. Recommendation</b>					
a. On the basis of the analysis completed above, I recommend that this position be placed in Level			b. Signature of Authorized Official		c. Date
<b>8. Review</b>					
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)					

## 220 Nonbargaining Unit Positions

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### 221 **Background Information — Standard Position Description**

The Office of Organizational Requirements develops and maintains the standard position description (SPD), the basic document used to describe and evaluate all nonbargaining jobs. This document contains all of the information essential to understanding the work performed. The substantive parts of the SPD describe position functions, activities, and tasks in general terms, allowing it to describe fundamentally similar jobs. Specific data, such as years of experience required, desired educational level, or personnel supervised, do not appear in the SPD; it serves only to describe in general terms types of duties normally expected of the incumbent, not all duties which may be assigned.

### 222 **Form 6802 — Request for Job Evaluation Action**

#### 222.1 **Purpose**

The Form 6802, *Request for Job Evaluation Action*, used to establish a new job or to revise an existing job, provides the basis for new or revised SPDs and for job evaluation actions, whether taken by the Field Divisions or the Office of Organizational Requirements. The Office of Organizational Requirements may also complete a Form 6802 as a result of an occupation study, review of positions involved in a reorganization, or normal monitoring of the system.

#### 222.2 **Conditions**

Requests for job evaluation action must be initiated on Form 6802 when a job's duties and responsibilities change or when a new job needs to be established.

#### 222.3 **Restrictions**

The following types of requests are not acceptable:

- a. Requests initiated by incumbents, except in connection with employee requests for job evaluation review (see Part 224).
- b. Requests initiated to solve personnel or other managerial problems not related to a job's duties and responsibilities.
- c. Requests sent outside the normal chain of command.

#### 222.4 **Responsibility**

A job evaluation action request is initiated on Form 6802 by the:

- a. Manager or supervisor to whom the position reports.
- b. Appropriate staff office.
- c. Employee, in the case of a request for review.

## 223 **Form 6802 Preparation**

### 223.1 **Summary**

Exhibit 215.1 provides a summary of the types of information necessary when filling out the Form 6802. Additional information and guidance is available from the compensation and staffing unit in Field Divisions and from the Office of Organizational Requirements at Headquarters.

### 223.2 **Entries**

#### 223.21 **Heading Entries**

Enter the following items in the heading of the Form 6802:

- a. *Date Prepared*. The date that the Form 6802 is typed in final form.
- b. *Facility (Item 1)*. The proper name of the organizational entity to which the position being described belongs. Provide enough information to indicate the position location clearly.
- c. *Location (Item 2)*. The standard mailing address, including the specific ZIP+4 code for the facility.
- d. *Present Title/Grade (Item 3)*. The current and complete officially authorized position title and grade.
- e. *Recommended Title (Item 4)*. Used only for a new or significantly changed job description.
- f. *Prepared By (Item 5)*. The name and title of the person preparing the request.
- g. *Requesting Installation Head (Item 6)*. The name, title, and signature of the person in charge of the installation or Headquarters organization.
- h. *MSC (Item 7)*. The name, title, and signature of the appropriate Management Sectional Center official (if applicable) with approval date.
- i. *Field Division (Item 8)*. The name, title, and signature of the appropriate Field Division official (if applicable) with approval date.
- j. *Region (Item 9)*. The name, title, and signature of the appropriate regional official (if applicable) with approval date.
- k. *APMG/SAPMG (Item 10)*. For Headquarters requests, the name and signature of the appropriate Assistant Postmaster General or Senior Assistant Postmaster General with approval date.

#### 223.22 **Body**

Do not write a methods study or describe the incumbent's weekly tasks or the employee's performance quality or quantity. Instead, develop an accurate, concise description of the job, including:

- a. The basic function and purpose of the job and how it "fits" into the organization.
- b. Independence, scope, and magnitude of specific employee responsibilities.
- c. Major duties performed in order of importance.

- d. Basic schooling, skill, and experience necessary for job proficiency.
- e. Job conditions in terms of safety, atmosphere (heat, dust, noise), and requisite physical effort.

223.3 **Sign-Off at Managerial Review Levels**

- 223.31 The initiating office must forward all job evaluation actions for approval through normal channels.
- 223.32 Management at each level of review may endorse, deny, or modify a request, but may not approve a new position or grade. The responsible manager:
- a. Indicates agreement or recognition of the change which necessitates the request for the job evaluation action by signing and dating the original.
  - b. Attaches comments or documentation.
  - c. Forwards it to the next management level.
- 223.33 At any level of review, a manager who does not fully endorse content of the Form 6802, will return it with appropriate comments to the originating office for revision or withdrawal.

223.4 **Action by Field Division**

- 223.41 Review the request for accuracy and adequacy; if necessary, obtain organization and staffing approval from the Office Organizational Requirements; and then take one of the following actions:
- a. Match the request to an existing SPD and prepare a Staffing Change Notice showing the proper title, grade, and occupation code of the position. Field Divisions are authorized to match jobs listed in the *Nonbargaining Unit Position Authorization Guidelines*, available from the Office of Organizational Requirements at Headquarters.
  - b. Deny the request and prepare a memorandum stating the reasons.
  - c. Forward the request to the Office of Organizational Requirements for approval and job evaluation action.
- 223.42 Send the Staffing Change Notice or memorandum to the initiating office, or forward the request to the Office of Organizational Requirements.

223.5 **Action by Office of Organizational Requirements**

- 223.51 Coordinate requests with the appropriate Headquarters functional area.
- 223.52 Review the request and take one of the following actions:
- a. Match the request to an existing Standard Position Description and prepare a Staffing Change Notice showing the proper position title, grade, and occupation code.
  - b. Revise an existing SPD to include the duties and responsibilities detailed in the request.
  - c. Develop a new SPD, assign an occupation code, and prepare a Staffing Change Notice.

- d. Deny the request and prepare a memorandum stating the reasons.
- 223.53 Make appropriate notification to the field division.

## 224 **Request for Job Evaluation Review (RFR)**

### 224.1 **Background Information**

#### 224.11 **Conditions**

Employees or managers at the initiating office who believe substantive information has been overlooked in a job evaluation may initiate a Request for Job Evaluation Review (RFR).

#### 224.12 **Employee/Management Differences**

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

### 224.2 **Documentation Requirements**

#### 224.21 **Preparation**

The incumbent or manager prepares the RFR on Form 6802 in accordance with the instructions in part 223. A cover letter or memorandum stating the differences between the content of the employee's assigned SPD and the actual duties and responsibilities must accompany the completed Form 6802.

#### 224.22 **Routing**

RFRs follow normal managerial channels to the appropriate Field Division office or, for Regional Headquarters and Headquarters jobs, to the Office of Organizational Requirements.

### 224.3 **Sign-Off at Management Review Levels**

#### 224.31 **Action Required Prior to Sign-Off**

Reviewing managers take the following actions:

- 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 will be returned.
- d. Forward the RFR through appropriate channels.

#### 224.32 **Sign-Off Procedure**

Each reviewing manager must sign and date both the original Form 6802 and the evaluative statement before forwarding the request to the next managerial level.

224.4 **Action by Field Divisions**

- 224.41 Analyze the RFR and take one of the following courses of action:
- a. Match the request to an existing SPD and prepare a Staffing Change Notice, showing the proper title, grade, and occupation code, but only for positions within their authority to approve.
  - b. Forward the request if not within their authority to the Office of Organizational Requirements for review with a summary of their analysis and comments.
  - c. Deny the request and prepare a memorandum stating the reasons.
- 224.42 Send the Staffing Change Notice or memorandum to the initiating employee's manager or installation head through normal managerial channels.

224.5 **Action by Office of Organizational Requirements**

- 224.51 Review RFRs for positions that may need nationwide review and review all regional and Headquarters positions.
- 224.52 Analyze the RFR and take one of the following courses of action:
- a. Match the request to an existing SPD and prepare a Staffing Change Notice, showing the proper title, grade, and occupation code.
  - b. Revise an existing SPD to include the duties and responsibilities contained in the request and prepare a Staffing Change Notice.
  - c. Develop a new SPD covering the duties and responsibilities contained in the request and prepare a Staffing Change Notice.
  - d. Deny the request and prepare a memorandum stating the reasons.
- 224.53 Send a memorandum to the initiating employee or manager, with a copy to the Field Division General Manager/Postmaster for field requests.

225 **Special Review Panel**

225.1 **Background Information**

- 225.11 If the RFR initiator believes that during review substantive information was overlooked, that person may request a second review, coordinated by the SAPMG, Human Resources Group, who will convene a special review panel composed of at least three officials at the department, office head, or equivalent level, joined by an Executive Secretary.
- 225.12 The Executive Secretary, a nonvoting member of the panel who reports directly to the SAPMG, Human Resources Group:
- a. Processes requests for panel review.
  - b. Convenes the panel.
  - c. Schedules meetings.
  - d. Compiles information necessary for decision making.
  - e. Serves as liaison to managerial associations and concerned Postal Service departments and offices.

- f. Develops review responses for issuance to employees.

225.13 The Special Review Panel meets at the discretion of the SAPMG, Human Resources Group, to review pending requests. The SAPMG, Human Resources Group, must concur with all decisions made by the special review panel.

225.2 **Required Documentation**

225.21 The initiator must make a written request for panel review within 60 calendar days after receiving the initial review decision. The initiator must:

- a. Send special review panel requests directly to

SPECIAL REVIEW PANEL  
HUMAN RESOURCES GROUP  
US POSTAL SERVICE  
475 L'ENFANT PLZ SW  
WASHINGTON DC 20260-4000.

- b. Include a copy of the initial review response containing the case reference number with the request. Provide any pertinent information not included in the initial request.

225.22 Any employee who desires representation by a postal management association should indicate this on the panel review request and send a copy of the request to that association. As soon as possible after receipt of said copy, the designated association will furnish a position paper to the panel.

## 230 Bargaining Unit Positions Covered by a National Agreement

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### 231 Background Information

#### 231.1 Evaluation of Position

Form 820, *Ranking of Position Request*, 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 reflect level distinctions clearly, 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.

#### 231.2 Purpose of Position Description

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 skills 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 Form 820 Use

#### 232.1 Purpose

Form 820 is used to establish and review position rankings and 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.

#### 232.2 Conditions

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

#### 232.3 Authority

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 Form 820 needs to be completed.

232.4 **Responsibility**

If a new or changed position does not match a key or standard position, level PS-5 or below, a Form 820 must be completed.

233 **Form 820 Preparation**

233.1 **Heading Entries**

Enter the following information on the form:

- a. *Name of Office or Organization (Item 1)*. Insert the name of the post office or other postal installation where the position exists.
- b. *Suggested Title of Position (Item 2)*. Enter the title proposed for the position to be ranked.
- c. *Recommended Salary Level (Item 3)*. Enter the PS level from Item 6D on the back of the form.
- d. *Date of Submission (Item 4A)*. Enter the date on which the Ranking of Position Request is submitted.
- e. *Reason For This Request (Item 4B)*. Enter the reason for submitting the Form 820.

233.2 **Body**

233.21 **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.

233.22 **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 (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 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 used, specify the work tasks attached to that position feature.

233.23 **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:
  - (1) Instructions received before, during, and after task performance.
  - (2) Available guidelines and procedures directly applicable to the work.
  - (3) Review of the finished work.
- d. If more than one supervisor in the chain of command reviews finished work, note this.

233.3 **Evaluation Report (Item 6)**

233.31 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.

233.32 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. After completing Items 6B and 6C, where appropriate, enter the PS level recommendation in Item 7D.

233.4 **Signature and Date of Authorized Official (Items 7B and 7C)**

By signing and dating the Form 820, the installation head certifies to the accuracy and completeness comparable to other official certifications.

233.5 **Sign-Off at Managerial Review Levels**

233.51 Managers at each level must review the initiating office’s recommendations.

233.52 If reviewing managers do not concur with the initiating office’s recommendations, they return the unsigned Form 820 with a memorandum explaining reasons for disapproval.

233.6 **Action by Field Division**

- 233.61 Match the request to an existing key or standard position and prepare a Staffing Change Notice showing the proper title, grade and occupation code, but only for positions listed in the Bargaining Unit Position Authorization Guidelines (available from the Office of Organizational Requirements at Headquarters).
- 233.62 If the job cannot be matched to an existing key or standard position, field division personnel are to forward the Form 820 to the Office of Organizational Requirements.
- 233.63 If the field division ranks the position, officials at that office return the original Form 820, signed and dated, to the initiating installation.

233.7 **Action by Office of Organizational Requirements**

233.71 **Job Evaluation Action**

The Office of Organizational Requirements evaluates the job against an existing key or standard position, revises an existing standard position, or establishes a new standard position.

233.72 **Coordination With Labor Relations Department**

After completing the job evaluation, the Office of Organizational Requirements forwards the new or revised position description to the Labor Relations Department for review, craft determination, and any further action required under terms of the National Agreement.

233.73 **Notification of Initiating Official**

After final approval, the Office of Organizational Requirements returns the Form 820 to the initiating official via the Field Division.

234 **Evaluation of Bargaining Unit Positions**

234.1 **Purpose**

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

234.2 **Basis for Position Evaluation**

- 234.21 Comparison of a position's duties, responsibilities, and work requirements to key positions in Chapter B of Handbook P-1, (future EL-201) serves as the only basis for evaluation. Specifically, these factors determine final ranking: the difficulty of the work to be performed, the degree of responsibility to be exercised, the scope and variety of tasks involved, and the conditions under which the work will be performed.
- 234.22 The following factors do not affect the position evaluation:
- a. The incumbent's knowledge, skills, abilities or previous position title.

- b. Designation of the roster from which the employee will be selected.

234.3 **Criteria for Evaluating Mixed Assignments**

234.31 **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.

234.32 **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.

234.33 **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.

234.34 **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.

235 **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

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To establish or change bargaining unit positions that are not covered by Agreements Between the USPS and the American Postal Workers Union; National Association of Letter Carriers; National Rural Letter Carriers Association; and National Post Office Mail Handlers, Watchmen, Messengers and Group Leaders requires submission of either Form 6802 or Form 820. Any questions regarding these position evaluations should be directed to an Office of Organizational Requirements representative.

## 250 Position Reviews

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To ensure proper position identification and proper evaluation of position duties and responsibilities, the Office of Organizational Requirements or other appropriate officials in management may review any position at any time by correspondence or onsite interview. The above officials will direct appropriate action to correct improper position evaluation or identification.