Drafting Essential Functions

What are Essential Functions?

Essential job functions are job duties that an employee must perform. Essential functions are not incidental job duties, which are extra or secondary duties. A function may be essential if:

- The position was created for the purpose of performing the function or job duty;

- There are a limited number of employees available who could perform the function or job duty; and/or

- The function or job duty is highly specialized and the position requires a special expertise or ability to perform the job duty.

Essential functions are specific to the individual position, not the position's job class. Essential functions are based on the work performed, not the ability of the employee. It is also critical to separate the function from the method of performing the function.

How do I determine which job functions are truly essential functions?

There are specific questions to ask when determining which functions of a position are essential.

1. Is it important to the agency's operation?
2. Is it performed with frequency?
3. Is there insufficient staff to reassign it?
4. Can it be redesigned or performed in another way?
5. Does the function require any specialization or expertise?
6. Would not requiring the function to be performed eliminate the need for the position?

If any of the above criteria are met, the function is likely essential. An understanding of the essential job functions aids in the process of selecting legal and appropriate interview questions. In addition, an employer may refer to those functions should an employee initiate a request for a reasonable accommodation or FMLA leave. If a selective is identified for the position, the selective must be correlated to an essential function.

The employer has the right to determine the essential functions, educational training requirements, and the performance standards of the job, as long as standards and requirements are consistently applied and are not established specifically to discriminate against people with disabilities." (*Baum*, et al., 2004)

How do I draft essential functions?

When drafting statements of essential functions, the statements need to be dynamic and active.

1. Determine if the employee is working with data, people, or with goods/items.
2. Determine what function or job duties the person in the position would perform.
3. Determine the amount of time spent on each function or job duty.
4. Determine if there are other employees available to perform that function or job duty or among whom the performance of that function or job duty can be distributed.
5. Determine the degree of expertise or skill required to perform the function or job duty.

Refer to the active statement chart below. Select the most appropriate action verb to begin the essential function statement.

Important information:
A function may be essential regardless of the amount of time spent performing it if it is critical to the reason for the position. *Example: An Airport Firefighter rarely has to carry a person from a burning airplane, but being able to perform this function is essential to the job. Essential Function: Carries people to safety in an emergency such as from a burning plane.*

Works with Data	Works with People	Works with Items
Accesses or Locates (from databases or files)	Advises, or Recommends or Suggests to	Accepts (goods, materials)
Analyzes or Interprets	Aids, Assists, Lifts, Carries	Carries
Checks or Verifies	Approves or Authorizes	Cleans or Sanitizes
Compares and/or Contrasts	Assigns to	Delivers
Compiles or Gathers	Asks or Requests of	Diagnoses or Troubleshoots
Computes or Tabulates	Communicates to/with	Drives
Copies or Records	Confers or Coordinates with	Handles
Corrects	Directs	Inspects
Creates (Information)	Encourages	Installs
Deletes	Explains or States to	Mails
Designs or Devises	Facilitates or Conducts	Maintains
Determines or Decides	Hires	Manipulates
Describes	Instructs or Trains	Measures or Weighs
Develops	Interviews	Modifies or Alters
Edits, Revises or Updates	Mentors	Operates, Controls
Enters or Files (data)	Negotiates	Lifts and/or Picks up
Establishes	Notifies	Pulls and/or Pushes
Evaluates	Orders	Purchases or Orders
Forecasts	Persuades, Diverts or Sells	Sets up or Constructs
Formulates	Presents to	Sorts or Separates
Forwards, Releases, Routes, or Transmits	Provides input or feedback, or Responds to	Stamps
Identifies	Reports to	Transports
Investigates or Researches	Schedules	
Logs	Serves or Helps	
Measures or Weighs	Speaks to	
Organizes	Supervises or Leads	
Proofreads	Takes instructions or requests from	
Prepares (Statistics, summaries)		
Prints or Runs (reports)		
Reads and Absorbs		
Reconciles		
Reviews		
Submits		
Studies		
Surveys		
Types		
Writes		

Drafting Essential Functions

The following worksheet is a tool to help you produce the essential and marginal functions of each job before preparing your job description and PDQ. The Americans with Disabilities Act (ADA) requires that employees and job applicants can only be evaluated based on his or her ability to perform essential job functions.

Other duties, which may be beneficial to the employer but not truly essential for the job, are considered **marginal** functions.

List each function of the position and indicate whether it is essential or marginal.

E	M	Function
X		Good Example: *Prepares daily statistical reports for agency director* (The essential function, or significant reason the position exists, is to produce statistical reports used daily by the director.). Bad Example: *Ability to type and read.*
X		Good Example: *Prepares meals daily for all internal residents* (The essential function, or significant reason the position exists, is to prepare daily meals for residents.). Bad Example: *Ability to cook food.*
	X	Good Example: *Copies all monthly invoices* (The main reason this position exists is not to make copies of all invoices. However, this is a marginal function of this position and could be reallocated to another employee at any time.). Bad Example: *Ability to use a copy machine.*

Job Requirements

This tool is to help you identify job requirements. Job requirements are not necessarily essential functions, but they do describe how the essential functions are accomplished. These should also be reflected on the job description to better describe the position requirements.

R = Rarely (0-15%)
O = Occasionally (16-45%)
F = Frequently (46-100%)

Physical Demands	R	O	F		Mental Demands	R	O	F
Standing	___	___	___		Problem Solving	___	___	___
Sitting	___	___	___		Make Decisions	___	___	___
Lifting ____ lbs.					Supervise			
Minimum lbs lifted					Organize			
_____ lbs.	___	___	___		Read/Write	___	___	___
Carrying	___	___	___			___	___	___
Walking	___	___	___			___	___	___
Driving	___	___	___			___	___	___
	___	___	___			___	___	___
	___	___	___			___	___	___
	___	___	___			___	___	___

Office Equipment	R	O	F		Field/Trade Equipment	R	O	F
Telephone	___	___	___		Mower	___	___	___
Computer	___	___	___		Tiller	___	___	___
Fax Machine	___	___	___		Ladder	___	___	___
Copier	___	___	___		Truck/Auto	___	___	___
	___	___	___		Hand/Power Tools	___	___	___
	___	___	___			___	___	___
	___	___	___			___	___	___

Working Conditions	R	O	F		Other	R	O	F
Indoor	___	___	___			___	___	___
Outdoor	___	___	___			___	___	___
High Temperatures	___	___	___			___	___	___
Low Temperatures	___	___	___			___	___	___
Loud Noises	___	___	___			___	___	___
Fumes/Odors	___	___	___			___	___	___
	___	___	___			___	___	___