

## SECTION 3.15 POSITION DESCRIPTION QUESTIONNAIRE (PDQ)

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The [Position Description Questionnaire](#) (PDQ) is the basic document used for position classification and the selection process. It is a written description of the duties, responsibilities, essential functions, organizational relationships, and applicable selectives and special requirements assigned to a position. It is a description which, if properly prepared, will allow identification of the kind and level of work being performed. When the kind and level of work are known, the appropriate job classification for the position can be determined. As the primary source of job information, the PDQ is critical to the position review process. It also serves as a resource for developing vacancy announcements, screening tools, interview questions, and performance plans.

The [Supervisory Analysis Questionnaire](#) (SAQ) is an addendum to the PDQ. It is used for positions supervising two or more employees and provides information on the nature of the supervision being exercised. Supervision is defined as “a responsibility assigned to an employee by management to direct the work of two or more employees and to hire, evaluate, reward, promote, transfer, layoff, recall, respond to grievances, and discipline those employees.” Supervision is different from lead work responsibilities, which are defined as “a responsibility assigned to an employee by management to direct the work (instruct, answer questions, distribute and balance work load, accept, modify, or reject completed work, maintain attendance records, report infractions, and provide input on staffing decisions) of two or more employees (federal, state, county, municipal, private employment organization, volunteers, inmates, or residents).” Lead work duties are included on the PDQ; a SAQ is not submitted for lead work or other non-supervisory positions.

The [Bargaining Exemption Questionnaire](#) (BEQ) is an addendum to the PDQ. The purpose of the BEQ is to collect and document relevant information necessary to determine coverage or exclusion from collective bargaining provisions. It is used for non-supervisory positions in contract-covered classes that may meet criteria for exemption from collective bargaining provisions of Iowa Code chapter 20. The BEQ is to be completed whenever there is a request for review of the bargaining status of a position, or if a position is currently exempt and an agency proposes changes in the position that could result in coverage by collective bargaining provisions. This form should not be submitted for positions in any job class that is exempt from collective bargaining provisions, unorganized, or supervisory.

The [Merit Exemption Questionnaire](#) (MEQ) is an addendum to the PDQ. The purpose of the MEQ is to collect and document relevant information necessary to determine coverage or exclusion from merit-system provisions. The MEQ is to be completed whenever it is necessary to determine coverage or exclusion from merit-system provisions. If the position is currently exempt and an agency proposes changes in the position that could result in coverage by the merit-system provisions, this same form is used to initiate the request for review.

A PDQ, SAQ, BEQ, and/or MEQ, as applicable, must be on file for each non-temporary position in the corresponding human resources office for the agency. The PDQ, SAQ, BEQ, and MEQ forms, along with instructions for their completion, are included in this chapter.

### When to Prepare a PDQ

A PDQ is to be prepared in the following situations:

- When a new position is established.
- When a job class change is requested for a position.
- When a change is made to a position's duties and responsibilities, even if the change may not warrant a class change.
- When DAS-HRE requests that a PDQ be prepared.

- When an employee wishes to submit a PDQ for review.
- When competencies or essential functions for a position are established or changed.
- When performance evaluation criteria are established.
- When supervisory duties are added or removed from a position.
- When lead work duties are added or removed from a position.

The timing of PDQ submission is particularly important when a change in job duties may result in a reclassification of a filled position. A PDQ must be prepared and submitted to DAS-HRE before a reclassification review will be initiated. A copy of the previous PDQ and current organization chart must accompany the PDQ.

### **Who Prepares the PDQ**

When a position is vacant, the supervisor prepares the PDQ.

When a position is filled, the employee or the supervisor may prepare the PDQ. Generally, the employee should prepare the PDQ, since the employee is most familiar with the duties of the position.

If the supervisor prepares the PDQ for a filled position, the affected employee must be allowed to review and comment on the PDQ. Any substantive disagreement regarding an assignment or description of job duties must be discussed. The supervisor makes the final determination of duties assigned to a position and incorporates those duties into the PDQ. The employee should sign indicating that they have reviewed the document. If the affected employee declines to sign, the PDQ should be signed by the supervisor adding a note to the PDQ indicating that the employee declined to sign the PDQ.

### **How to Prepare a PDQ**

A PDQ must describe the duties and responsibilities assigned to a position in sufficient detail to give the reviewer a basic understanding of:

- The purpose of the position.
- How the position fits into the organizational structure.
- Where the position's work comes from and in what form.
- What the position does with the work and why.
- Where the work goes when the position is finished with it and why.
- The essential functions of the position.

The challenge is to provide neither too little nor too much information. Key factors to keep in mind when preparing a PDQ include the following:

- Describe job duties thoroughly. When a general or ambiguous verb, such as assist, handle, prepare, audit, conduct, supervise, administer, coordinate, manage or review is used, provide additional supporting information that explains the term.
- When describing documents, forms, or procedures specific to a work unit or department, provide information to indicate the basic nature of the work.
- Use your own words to describe the work, not illustrative examples of work performed found on a class description or duties copied from another PDQ.

- The first time an abbreviation, acronym, or form number is used, provide a definition or explanation.
- Separate duties rather than grouping several duties together in large percentages of time.
- When referring to a job title, type of occupation, or profession, provide specific information about the actual work performed.
- Ensure that all information provided is accurate and complete.

### **Essential Functions**

The Americans with Disabilities Act (ADA) prohibits discrimination on the basis of disability. Essential functions are defined as “those functions that an individual must be able to perform in order to hold the position.” Essential functions focus on what must be done not on how it is accomplished.

It is the supervisor’s responsibility to determine the essential functions of a position and to document them on the PDQ. Please reference the [Drafting Essential Functions tool](#) to assist you in identifying essential functions.

A master PDQ may be developed for those situations where common duties, responsibilities, and identical essential functions are assigned to a number of positions within a job class, including positions that may rotate through a variety of assignments. Care must be taken, however, to insure that master PDQs do not cover positions that have some subtle differences that set them apart from the rest of the positions in the job class. Those subtle differences could be sufficient to have an impact on the classification of a position. If the essential functions are not the same, a separate PDQs should be completed for each individual position.