
## Essential and Marginal Job Functions Worksheet

This worksheet will help departments determine the essential and marginal functions of a job, as required by the Americans with Disabilities Act (ADA). The worksheet should be completed *before* (1) preparing the job description; (2) beginning the hiring process; (3) requesting a fitness for duty under the FMLA; or (4) initiating the reasonable accommodation process. The essential and marginal functions must accompany the job description in order to determine whether an applicant can perform the essential duties of a position.

When completing the Worksheet, consider these important questions:

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| * Does the job exist to do this function?
* Would taking this function from the job fundamentally change the job?
* Would there be significant consequences if this function were not performed?
* Can other employees do this function if necessary?
* What equipment is used to do this function?  How frequently is the equipment used?
* What are the physical and mental requirements of this function?
* What critical skills, experience, training, education, and/or license are needed?
* How much time per week is spent doing this function?
* What are the minimum qualifications and job standards?
* Could this function be performed in another way?
* Did the previous employee do this function?
* Do people in similar positions elsewhere do this function?
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**How to use this form:** First, name and save this file. To enter information, use the Tab key or click in the shaded field.

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| A. basic information |

|  |  |
| --- | --- |
| Job title |       |
| Work location |       |
| General purpose of the position |       |
| Incumbent’s name (if applicable) |       |
| Form completed by |       |
| Date |       |

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| B. essential job functions |

Please provide a written description of each essential function in the spaces provided below. An **essential job function** must meet one of these three criteria; otherwise, the function must be **marginal:**

1. The reason the position exists is to perform this function. Removing this function would fundamentally change the position.
2. There would be significant consequences if this function were not performed.
3. A limited number of employees are available to perform this function.

*Example for a computer programmer:* Develops programs from workflow charts or diagrams, considering computer storage capacity, speed, and intended use of output data.

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| C. marginal job functions  |

Please provide a written description of each marginal function in the spaces provided below. While a **marginal** **job function** may be important and needs to be done by someone, it is not essential—its removal does not fundamentally change the position. Or, a relatively high number of employees are available to perform the marginal function.

*Example for a computer programmer:* Program Web site scripts as needed.

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| D. Elements integral to the position |

Identifying the necessary physical and mental elements required of a position provides insight into its functions. For each item listed below, indicate its frequency by clicking a checkbox. *Check one box only*. Blank spaces are provided to write in your own items.

R = Rarely used 0-15% frequency

O = Occasionally used 16-45% frequency

F = Frequently used 46-100% frequency

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **OFFICE EQUIPMENT**

|  |  |
| --- | --- |
| None | [ ]   |
| Telephone | [ ]  R [ ]  O [ ]  F |
| Copier | [ ]  R [ ]  O [ ]  F |
| Computer | [ ]  R [ ]  O [ ]  F |
| FAX machine | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |

 | **FIELD/TRADE EQUIPMENT**

|  |  |
| --- | --- |
| None | [ ]   |
| Mower | [ ]  R [ ]  O [ ]  F |
| Tiller | [ ]  R [ ]  O [ ]  F |
| Ladder | [ ]  R [ ]  O [ ]  F |
| Truck/auto | [ ]  R [ ]  O [ ]  F |
| Shovel/rake/mop | [ ]  R [ ]  O [ ]  F |
| Hand/power tools | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |

 | **OTHER**

|  |  |
| --- | --- |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |

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| **PHYSICAL DEMANDS**

|  |  |
| --- | --- |
| Standing | [ ]  R [ ]  O [ ] F |
| Sitting | [ ]  R [ ]  O [ ] F |
| Lifting     lbs. (Minimum lbs. lifted    ) | [ ]  R [ ]  O [ ] F |
| Carrying | [ ]  R [ ]  O [ ] F |
| Walking | [ ]  R [ ]  O [ ] F |
| Driving | [ ]  R [ ]  O [ ] F |
|       | [ ]  R [ ]  O [ ] F |
|       | [ ]  R [ ]  O [ ] F |

 | **MENTAL DEMANDS**

|  |  |
| --- | --- |
| Problem solve | [ ]  R [ ]  O [ ]  F |
| Make decisions | [ ]  R [ ]  O [ ]  F |
| Supervise | [ ]  R [ ]  O [ ]  F |
| Interpret data | [ ]  R [ ]  O [ ]  F |
| Organize | [ ]  R [ ]  O [ ]  F |
| Read/write | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |

 | **WORKING CONDITIONS**

|  |  |
| --- | --- |
| Indoor | [ ]  R [ ]  O [ ]  F |
| Outdoor | [ ]  R [ ]  O [ ]  F |
| High temperatures | [ ]  R [ ]  O [ ]  F |
| Cold temperatures | [ ]  R [ ]  O [ ]  F |
| Loud noise | [ ]  R [ ]  O [ ]  F |
| Fumes | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |
|       | [ ]  R [ ]  O [ ]  F |

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For assistance completing this worksheet, contact Frank Epperson 812-855-7511 or fepperso@indiana.edu.