



Duke University/Health System

ESSENTIAL AND MARGINAL JOB FUNCTION ANALYSIS FORM

Under the guidelines of the American with Disabilities Act (ADA), departments are required to complete an *essential function*¹ analysis when a disability accommodation request is made. Departments are encouraged to complete the analysis prior to advertising vacant positions and use the information in the interviewing process. Additionally, departments are encouraged to use an essential and marginal job function analysis information to conduct staff training and performance evaluations.

This essential function analysis is an effective tool, which will ensure accurate identification of essential and marginal functions, time required, physical activities, physical and cognitive requirements, equipment used and environmental surroundings. This tool identifies who, what, why, how much, and when. As you review the items on the following pages, please assess and indicate whether each is “essential” (E), “marginal” (M), or “not applicable” (N/A)

If you have any questions or comments regarding this form please contact Barbara J. Briner, Program Director, Employment and Public Reasonable Accommodations, Disability Management System, at (919) 684-8247 v/tty or barb.briner@duke.edu.

¹According to the Equal Opportunity Commission’s *Technical Assistance Manual on Employment Provisions (Title I) of the Americans with Disabilities Act*, a job function may be considered essential for any of several reasons, including, but not limited to, the following: (1) the reason the position exists is to perform that function, (2) there are a limited number of employees among whom performance of that function can be distributed, (3) the function is highly specialized and the incumbent was hired for expertise or ability to perform it. Evidence as to whether a function is essential includes, but is not limited to: (1) employer’s judgment, (2) written job description prepared prior to advertising or conducting interviews, (3) amount of time spent on the job performing that function, (4) consequences of not requiring incumbent to perform that function, (5) terms of a collective bargaining agreement, (6) work experience of prior incumbents, (7) current work experience of incumbents in similar jobs.

Job Title: _____

Cognitive Processes	E	M	N/A
1. Is the inspection of products, objects or materials necessary?			
2. Does the job require analyzing information or data?			
3. Does job require planning sequences of operation or actions?			
a.) Simple planning			
b.) Complex planning			
4. Does job require decision-making skills?			
a.) Simple decisions			
b.) Complex decisions			
5. Is logic required to define problems, collect information, establish facts, draw valid conclusions, interpret information, and/or deal with abstract variables?			
6. Are basic counting, addition and/or subtraction of numbers required?			
7. Is performing algebra, geometry, and statistics necessary?			
a.) Simple calculations			
b.) Complex calculations			
8. Is the ability to comprehend written language required?			
a.) Basic instructions, safety rules, office memoranda			
b.) Technical or professional materials, financial or legal reports			
9. Is the ability to write necessary?			
a.) Compose letters or memos			
b.) Compose and/or edit reports or technical professional material			
10. Is the ability to comprehend verbal language necessary?			
a.) Comprehend simple verbal sentences and instructions			
b.) Comprehend technical and complex information			
11. Is verbal communication necessary?			
a.) Is talking with complex, technical or professional English required?			
b.) Is conversing in standard English necessary?			
c.) Is knowing a foreign language required? (If Yes, specify below)			

Foreign language requirements: _____

Comments:

Job Title: _____

Position Context Variables	E	M	N/A
1. Work with frustrating situations: Job objectives are hindered by events beyond the employee's control.			
2. Job is a high demand position: Experience high stress situations.			
3. Advising required: Counsel, recommend, guide, or caution others based on legal, financial, scientific, technical or other professional area.			
4. Coordinate activities of others to achieve objectives, but without authority.			
5. Teaching others, formally or informally.			
6. Participation in group activities requiring interpersonal skills and cooperation.			
7. Working under time pressures: Rush or urgent deadlines.			
8. Working on irregular schedule: Unscheduled overtime, called into work, and unanticipated changes in workplace.			
9. Handling of multiple assignments, conflicting demands or priorities.			
10. Maintain attention to detail over extended period of time, continually aware of variations in changing situations.			
11. Traveling is required.			
12. Quick reaction or immediate response to emergencies.			
13. Research, fact finding, interpretation, and investigation required in preparing reports or evaluations.			
14. Responsible for money, equipment or personnel. Severe consequences to department, University, or co-workers if objectives not met.			
15. Work is performed independently or with minimal on-site supervision.			
16. Supervising required: Recruit, screen, hire, assign and/or review work, train, and/or evaluate other employees.			

Comments:

Job Title: _____

Degree of physical activity: Indicate the percent of time pushing and pulling activities are performed to complete the essential functions. The total must equal 100%.

	N/A	24%	25-49%	50 – 74%	>75%
Sedentary: Exert up to 10 lb. of force occasionally and/or a minute amount frequently					
Light: Exert up to 20 lb. of force occasionally and/or up to 10 lb. of force frequently					
Medium: Exert 20 – 50 lb. of force occasionally and/or up to 15 lb. of force frequently					
Heavy: Exert 50 – 100 lb. of force occasionally and/or up to 30 lb. of force frequently					
Very Heavy: Exceed 100 lb. of force occasionally and/or 50 lb. frequently					

Physical Requirements	E	M	N/A
1. Is talking necessary?			
2. Is hearing necessary?			
3. Is sight necessary (If No, Skip a.) – d.)			
a.) Is the ability to distinguish between colors necessary?			
b.) Is depth perception necessary?			
c.) Is vision clarity of ≥ 20 ft. necessary?			
d.) Is vision clarity of < 3 ft. necessary?			
e.) Is entire field of vision/periphery required?			
4. Is walking necessary? (If No, skip a.) and b.)			
a.) Is walking on ramps necessary?			
b.) Is walking long distances necessary (> 1 mile throughout the day)?			
5. Is sitting a part of the job? (If No, skip a.) – c.)			
a.) 0 – 2 hours per day			
b.) 2 – 4 hours per day			
c.) 4 – 8 hours per day			
6. Is standing a part of the job? (If No, skip a.) – c.)			
a.) 0 – 2 hours per day			
b.) 2 – 4 hours per day			
c.) 4 – 8 hours per day			
7. Is a certain amount of dexterity required? (If No, skip a.) – c.)			
a.) Is good balance required?			
b.) Does it require the ability to seize, hold, and turn an object in one's hand?			
c.) Does the job require pinch type activity of one's fingers?			
8. Are climbing ladders and/or stairs necessary? (If No, skip; a.) and b.)			
a.) Will climbing involve carrying a load > 10 lbs.?			
b.) Will climbing frequency be > 25 times per day.			
9. Does the job require the lifting of any loads? (If No, skip a.) thru d))			
a) Lifting > 10 lbs.			
b) Lifting > 25 lbs.			
c) Is lifting infrequent ² ?			
d) Is lifting frequent ² ?			
10. Is pushing or pulling of any loads required (If No, skip a.) and b.)			
a.) Is it infrequent ² ?			
b.) Is it frequent ² ?			
11. Does it require repetitive motion ¹ behavior?			
Physical Requirements (cont'd.)	E	M	N/A

12. Is crouching required (bending down in a squatting position)? (If No, skip a.) and b.)			
a.) Maintain crouch for > 5 minutes at any one time?			
b.) Repetition of crouching motion (> 2 times per minute)?			
13. Does it require any kneeling (resting body on the knees)? (If No, skip a.) and b.)			
a.) Kneeling > 5 minutes at any one time?			
b.) Repetition of kneeling motion (>2 times per minute)?			
14. Does it require any bending (at the waist)? (If No, skip a.) and b.)			
a.) Maintain bending for > 5 minutes at any one time?			
b.) Repetition of bending motion (> 2 times per minute)?			
15. Does it require any crawling (moving on one's hands and knees)?			
16. Lift: To raise or lower an object > 10 lb. from one level to another.			
17. Lift: To raise or lower an object > 25 lb. from one level to another.			
18. Carry: To transplant an object.			
19. Balance: Exceeding ordinary body equilibrium.			
20. Reach: Extend hands and arms in any direction.			

¹ Repetitive motion is present if same motion is performed ≥ 20 times per minute.

² Infrequent means ≤ 1 lift/push/pull every 30 minutes. Frequent means ≥ 1 lift/push/pull every 5 minutes.

Job Title: _____

Physical Surroundings and Hazards	E	M	N/A
1. Does job require worker to spend time outdoors? (If No, skip a.), b.), and c.)			
a.) 0-2 hours per day			
b.) 2-4 hours per day			
c.) 4-8 hours per day			
2. Does work require being in extreme temperatures for more than 1 hour? (If No, skip a.) and b.)			
a.) Temperatures < 32 degrees			
b.) Temperatures > 80 degrees			
3. Is noise sufficient to cause the worker to shout in order to be heard?			
4. Is there exposure to vibrating movements to the extremities or entire body?			
5. Risk of bodily harm due to proximity of moving parts, electric current, chemicals, etc.?			
6. Conditions that may affect the respiratory system, skin, or allergies (fumes, odors, air particles, etc.)?			

General Comments:

Equipment, Tools, electronic and communication devices: List those the employee will use to perform job.		
1.	6.	11.
2.	7.	12.
3.	8.	13.
4.	9.	14.
5.	10.	15.

Location where work is performed:	
Day/Hour Schedule:	
Position reports to:	
Name of person completing form:	
Title of person completing form:	
Date:	