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**CG-121, Civilian Human Resources**

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# The Manager's Guide to Position Classification

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## INTRODUCTION TO POSITION CLASSIFICATION

Title 5, United States Code, governs the classification of positions in the Federal service. The law states that positions shall be classified based on the duties and responsibilities assigned and the qualifications required to do the work. As such, a position description (PD), or job description (JD) for a wage-determined position, may be the single most important document for a civilian employee and the employee's supervisor. It is the basis for a number of action items by management. The information in the PD is used for:

- *Classification.* The PD is used to identify the pay plan, title, series, grade level, position sensitivity, and competitive level of the civilian position.
- *Recruiting.* The PD identifies qualifications for the position and the key knowledge, skills, and abilities required to perform the work of the position. Selective factors (*e.g.*, knowledge of a foreign language) or conditions of employment (*e.g.*, travel required 50 percent of the time, security clearance requirement or physical requirements) are also identified from the position description. The PD is the basis for the vacancy announcement/questionnaire that is developed to recruit for the position.
- *Performance Appraisal.* The PD identifies the major duties and responsibilities of the position, that in turn generate or link to the critical performance elements and work plans used in the performance appraisal plan.
- *Training.* The PD identifies those functions aligned with job related training requirements.

Generally, a new position description is required when:

- A new position is established.
- The major duties of a position changed since the last official classification decision.
- The position duties and responsibilities are modified as a result of a proposed reprogramming, position upgrade request, or other management action.

For changes to a position that do not require a new PD, it is adequate to mark up the existing document and have the supervisor initial those changes (this is known in HR as a "pen and ink" change to a position description).

In the case of a position upgrade request, submitted while a position is encumbered, understand that this is not a simple classification matter. Merit System Principles (5 USC § 2301) require that employee "advancement should be determined solely on the basis of relative ability, knowledge and skills, after fair and open competition which assures that all receive equal opportunity." Promotions that are requested outside of a competition are sometimes called "*accretion*" promotions because new duties have "accreted" or accumulated, perhaps affecting the target grade of the position. CG-121 must consider such requests and circumstances carefully to ensure that they are the best available option for the Coast Guard, as well as for its Commands and individual employees. These involve legal, fiscal, organizational equitability and other considerations as well.

## ROLES AND RESPONSIBILITIES

The supervisor, the Command Staff Advisor (CSA)/Human Resources (HR) Specialist, and CG-121 Management all have roles in creating the position description.

### *Supervisor's Role and Responsibilities*

- Develop draft position description, in accordance with USCG and Office of Personnel Management (OPM) guidance/standards, which accurately describes the major duties and responsibilities of the position(s), to include any major position requirements or conditions of employment (*e.g.*, drug testing, security clearance, special certifications or license requirements, physical, travel or work schedule requirements).
- Propose the pay plan, title, series and grade of the position to be classified. Initiate the OF-8 Position Description Coversheet. (See “Manager’s Guide to Completing the OF-8,” subsequent page). By signing the OF-8, the supervisor certifies the accuracy of the duties and requirements of the position.
- Determine the position sensitivity by application of the OPM designation tool from the OPM website (<http://www.opm.gov/investigations/background-investigations/position-designation-tool/>), in coordination with the HR Specialist.
- Consult with CSA/HR Specialist to discuss the impact of the proposed classification on the organization and/or to ensure compliance with OPM and agency position classification procedures.
- In concert with CG-121, coordinate with Personnel Allowance and Staffing Division (CG-833), when necessary, to submit any requests for establishment of a new position(s) or reprogramming of a billet(s) or position upgrade(s) via the reprogramming request process as outlined in CI M5312.13B, Chapter 2.A6.
- Submit Position Description to servicing CSA/HR Specialist with any supplemental documentation, to include:
  - Request for Personnel Action (SF-52)
  - Position Description Coversheet (OF-8)
  - Copy of organization chart, approved by CG-81, showing the position and supervisory relationships
  - Copy of memo to CG-833, when applicable
- Review position description(s) periodically to determine if it is current or will need to be revised or rewritten as a result of significant changes to the position or within the organization. Significant changes which may constitute the need for a redescription include any change that affects the title, series, or grade of the position, the addition or deletion of a major duty or change in the level of supervisory controls.
- Minor changes to a position description may be accomplished via “pen-and-ink.” When using a standardized or centrally developed position description, only pen-and-ink changes will be allowed and must be approved by the program office.
- In cases where civilians are supervising uniformed staff, and vice versa, provide military statement of duties, civilian position descriptions, organizational charts, and functional statements, upon request.
- Provide a copy of the position description to the affected employee(s).
- Maintain a copy of all current, subordinate employee position descriptions.

### *Command Staff Advisor's/Human Resources Specialist's Role and Responsibilities*

- Provide guidance and advice on position classification.
- Provide position management advice to ensure the organization and position(s) are structured efficiently and economically, (e.g., supervisory ratios, grade inversion, organizational consistency, precedent setting actions).
- Work with management to develop a new or rewrite an existing position description.
- Provide copies of position classification standards from the OPM Web site and explain the process of how to write a position description.
- Review position description submitted for accuracy and to ensure sufficient documentation has been included to support proposed classification.
- Determine the tentative classification of the position and/or determine final classification in accordance with the Office of Personnel Management classification standards
- Forward position description for final classification, if needed, in accordance with agency classification authority.
- Notify management of final classification decision and provide copy of completed OF-8 and position description.
- Make the determination whether an accretion of duties promotion is applicable to the position description (if the new position description is classified at a higher grade and the position is encumbered).
- Provide rationale to management if requested classification is not supportable.
- Advise management on the impact of new classification standards.
- Train supervisors on new/updated position classification standards.
- In cases where civilians are supervising uniformed staff, and vice versa, compare the information provided against appropriate classification guidance, and document an equivalent classification determination for the military position in question.

### **POSITION MANAGEMENT**

CG-121, along with other Coast Guard components, plays a role in managing the civilian positions that are established and filled. Sound position management involves carefully designed position structures which combine the skills and taskings of employees with the goal of successfully carrying out the organization's missions or programs. If classification is assigning each individual position a series, title and grade, then position management involves reviewing all the positions in an organization, together, to see if they effectively support the organization's mission, programs and relative operating level. Some of the activities undertaken are:

- Examine the balance of: (1) professional employees; (2) technicians; (3) fully trained employees; (4) trainees; (5) supervisors; and (6) subordinates.
- Consider the grade levels assigned to each individual position, but also grades of similar positions in other sectors, units or offices.
- Review the appropriate use of team leads versus supervisors.
- Analyze each position against similar positions in other USCG organizations for matching series, title and grade.

- Watch out for the presence of “grade inversion” or the supervision of higher-ranked personnel by lower-ranked personnel. Determining the presence of grade inversion becomes more challenging in a blended military/civilian work environment, but is no less critical in that scenario. Resolution of the grade inversion issue is necessary and may require extra effort on the part of HR and the supervisor to properly document and analyze the appropriate management structure. Although the civilian and military pay structures are fundamentally different, grade inversion can result in significant issues including erosion of employee morale, concerns about the application of good position management, questions about the validity of the grades of the civilian positions, and negative impacts on the mutual understanding of reporting relationships among our workforce.

## HOW TO WRITE A POSITION DESCRIPTION

The supervisor determines an employee’s work assignments and is therefore, responsible for ensuring that a PD accurately describe the duties and responsibilities an employee is required to perform. A position description describes the major duties and responsibilities of the position. When writing a PD, it is sometimes easier to start by making a list of all the tasks that the incumbent will perform. Once the list is complete, group all like tasks together to equal a duty. In some cases a duty may be composed of only one or two tasks. Consulting the classification standards may be helpful in order to properly address the following questions:

### What work is required?

- What work is assigned to the position?
- What are the primary major duties? If you list more than five or six major duties, you’re probably misunderstanding what a “major” duty is.
- How often are the duties performed? (*i.e.*, reflect the percentage of time spent on each major duty). This small detail impacts the series, title and grade assigned. Ideally a “major” duty is completed 25% of the time, but CG-121 recognizes that a manager sometimes has good reasons to list smaller, but impactful, duties, too. Each duty should constitute at least 5% of the time spent in the position, to avoid too diffuse a description of the job. Estimate the best you can.
- Quantify whenever possible (*i.e.*, indicate dollar volume for financial responsibility; number of accounts, ledgers, grants; number of persons supervised, etc.).

### How is the work performed?

- How is the work accomplished? (*i.e.*, methods, procedures)
- Who does the incumbent contact on a regular basis? On an infrequent basis?
- What is the purpose of the contact?
- What guides are available for the incumbent?
- How much judgment is required to interpret the guides? Does the position work with other positions or alone? What type of involvement occurs with other positions?

### What knowledge or special skills are required?

- Does the incumbent need a basic knowledge of the field or is an expert required?
- Are there any special tools or equipment required to perform the duties?

- What are the minimum qualifications a person must possess to do the job (education, training, and/or experience)? Requirements for degrees (e.g., undergraduate, graduate) and/ or medical qualifications cannot be added if not required by an approved Office of Personnel Management qualification standard.
- Does the incumbent need a license or a college degree? What specific materials, equipment or machines are used in carrying out the job?

#### How much supervision is required?

- What type of supervision is received? Who reviews a completed project for accuracy?
- How frequent is work reviewed?
- How much time do you or another employee spend with the incumbent?
- How much independence is the incumbent afforded?
- How often is the work reviewed?
- How is work assigned?
- How much of a role does the employee play in determining how the work is completed?

#### How to Describe a Position

- Describe the functions of the position not the qualifications of the individual performing the job.
- Write the position description in a concise, uniform, and complete fashion to enable reviewing personnel to understand clearly the major duties and responsibilities.
- Write the position description in plain, straightforward, everyday English. Use common terms.

#### Wording of the Position Description

##### **Do:**

- Use short, direct verbs in the present tense.
- Write out the meaning of acronyms the first time they are used.
- Refer to the classification standard for an idea of what is to be covered.
- Describe specifically and in sufficient detail:
  - What work is completed?
  - What methods are used?
  - What equipment and/or tools are used?
  - Who has final responsibility for the results of the incumbent's work?
  - What are the consequences of actions or errors the incumbent makes?
  - How specific are instructions and guidelines provided?
  - How much supervision does the incumbent exercise, and how much does the incumbent receive?
  - What is the relationship of the position to others within the organization?
  - Are there any other pertinent facts?

##### **Avoid:**

- Copying the classification standard verbatim.
- Using ambiguous terms, such as "handle," or "research," without an explanation as to what is entailed.

- Lumping several major responsibilities together and assigning large percentages of time (e.g., 60%, 80%).
- Using abbreviations or technical terms without an explanation.
- Describing personal characteristics (e.g., “Deals with the public and must have a pleasing personality at all times”).

## POSITION DESCRIPTION FORMATS

### I. General Schedule Positions

The General Schedule (GS) classification and pay system covers the majority of civilian white-collar federal employees in professional, technical, administrative, and clerical positions. The PD should be written in the format prescribed by the standard used to grade the position. The format varies depending on the classification standard or guide used to grade the position. There are three major formats for writing a position description classified under the GS System. Supervisors should consult with their CSA or HR Specialist to ensure that the PD is developed in the correct format, to avoid multiple rewrites.

- General Schedule Supervisory Guide Format

The *General Schedule Supervisory Guide (GSSG)* covers all supervisory GS positions grades 6 through 15 whose primary functions are to provide both technical and administrative supervision to subordinate Federal government employees or military members at least 25% of the work time. The GSSG also covers managerial positions as long as the managerial and supervisory duties encompass 25% of the employees’ work time. It is a point-based system with six factors. The PD first describes the MAJOR DUTIES and then addresses each of the factors. To ensure the correct classification, when developing a GS supervisory PD, it is strongly recommended (and a best practice) to include both the supervisory factors (six factors) and the FES factors (or other narrative factors) based on the non-supervisory duties.

- Narrative Format

The PD for this format is written in a narrative or descriptive style. The items addressed in the PD will vary based upon the classification standard that is used to evaluate the position. The PD must include:

- **Major Duties.** Pay particular attention when describing the duties to ensure clarity of the type of work performed and the procedures involved in performing the work.
- **Supervisory Controls** (i.e., how the job assignments are made, what kind of supervision is received while performing the work, what oral and written guidance is available and how the work is evaluated).
- **Other factors** identified in the position classification standard.

- Factor Evaluation System Format

The Factor Evaluation System (FES) format covers a large majority of the positions in the Coast Guard. The FES covers all non-supervisory GS positions grades 1 through 15. It is a point-based system with nine factors. The PD has three parts – an introduction, description of the major duties of the position and the following nine factors:

- Factor 1 – Knowledge Required by the Position

- Factor 2 – Supervisory Controls
- Factor 3 - Guidelines
- Factor 4 - Complexity
- Factor 5 – Scope and Effect
- Factor 6 – Personal Contacts
- Factor 7 – Purpose of Contacts
- Factor 8 – Physical Demands
- Factor 9 – Work Environment

## II. Federal Wage System Positions

The Federal Wage System covers civilian blue-collar Federal employees and is identified in most cases by Wage Grade (WG), Wage Leader (WL) and Wage Supervisor (WS). For more information and a sample position description for each of the formats, click on the links below.

- Wage Grade Format

This format covers all Federal Wage System (FWS) non-supervisory positions grades 1 through 15. The PD describes the major duties and then addresses the following four factors:

- Factor I - Skills and Knowledge Required
- Factor II - Responsibility
- Factor III - Physical Effort
- Factor IV - Working Conditions

- Wage Leader Format

This format covers all Federal Wage System Leader (WL) positions. The PD consists of a job summary specifying the kind of work led, a description of the major duties that identifies how the position leads others and then addresses the same four factors listed in the WG format, above. FWS leader positions are normally classified one grade level above the highest grade level of the work led.

- Wage Supervisor Format

This format covers all Federal Wage System (WS) supervisory positions. The PD describes the major duties and the supervisory controls and then addresses the following three factors:

- Factor I - Nature of Supervisory Responsibility
- Factor II - Level of Work Supervised
- Factor III - Scope of Work Operations Supervised

## **FINALIZING THE POSITION DESCRIPTION**

[CIM M12510.6C](#), Position Classification Manual requires that a position description have a completed OF-8. The OF-8 is a cover sheet for the employee's official position description and is designed to document and certify the position classification decision. It is also used to assist in capturing and identifying essential position data and requirements. The OF-8 is completed by both the supervisor of the position and the servicing CSA or HR Specialist. The OF-8 is initiated

by the supervisor of the submitting office. Please see page 19 of this document for an example of a properly completed OF-8.

### **FORMAT FOR A GS SUPERVISORY PD (6 FACTORS)**

The General Schedule Supervisory Guide covers all supervisory GS positions grades 6 through 15 whose primary function is to provide both technical and administrative supervision to subordinate Federal government employees at least 25% of the work time. It also covers managerial positions as long as the managerial and supervisory duties encompass 25% of the employee's work time. It is a point-based system with 6 factors. To ensure the correct classification, when developing a GS supervisory PD, it is strongly recommended (and a best practice) to include both the supervisory factors (six factors) and the FES factors (or other narrative factors) based on the non-supervisory duties.

#### 1. Major Duties

Does each major duty describe:

- The work to be performed?
- The procedures/processes involved in performing the work?
- The proportion of time spent on each major duty (each one at least 25% of the time)?
- Do percentage totals equal 100%?

#### 2. Performs other duties as assigned.

Is this statement at the end of the Major Duties?

#### 3. Are the six GSSG evaluation factors thoroughly addressed?

##### **Factor 1. Program Scope and Effect**

- The program (or program segment) directed.
- The work directed, the products produced, or the services delivered.
- The impact of the work, products and/or programs described; on the mission and programs of the customer, the activity, other activities in or out of government, other agencies, the general public, and others.

##### **Factor 2. Organizational Setting**

- Identify the supervisory position in relation to higher level of management.
- Identify any unusual situations where direction and performance appraisal may be received from different individuals.

##### **Factor 3. Supervisory and Managerial Authority Exercised**

- Describe delegated supervisory and managerial authorities exercised on a recurring basis.

\_\_\_ Address how supervision (i.e., work planning, assigning, scheduling, coordinating and reviewing) is accomplished.

\_\_\_ Address how assigned personnel management responsibilities; and/or exercising managerial authority is accomplished.

**Factor 4. Personal Contacts**

\_\_\_ Factor 4A - Nature of Contacts.

\_\_\_ Factor 4B - Purpose of Contacts describe the essential purpose of contacts, consistent with contacts described in Factor 4A.

**Factor 5. Difficulty of Typical Work Directed**

\_\_\_ Identify the highest level of basic work (non-supervisory and mission oriented) within the unit supervised, which represents at least 25% or more of the workload of the organization. Include the workload of General Schedule, Federal Wage System, assigned military, contractors, volunteers, trainee employees, etc.

**Factor 6. Other Conditions**

\_\_\_ Describe conditions under which supervisory duties, authorities and responsibilities are accomplished (*e.g.*, type of work supervised, subordinate supervisors, subdivisions within the unit supervised, physical dispersion, shift operations, changing technologies, special hazard and safety conditions).

\_\_\_ Describe conditions of employment required for a position (*e.g.*, Top Secret Clearance, drug testing requirement, travel requirement for 30% of the time).

\_\_\_ Identify selective factors required by the duties of the position (*e.g.*, requirement for foreign language proficiency, specific contracting certifications required).

## FORMAT FOR A NARRATIVE GS PD

The PD for this format is written in a narrative or descriptive style. It normally includes four different kinds of information, but is dependent on the classification standard that covers the position.

- Introduction - a statement of the primary purpose of the position and its relationship to the organization
- Major Duties - pay particular attention when describing the duties to ensure clarity of the work performed and the procedures involved in performing the work.
- Supervisory Controls - how the job assignments are made, what kind of supervision is received while performing the work, what oral and written guidance is available and how the work is evaluated.
- Special Qualification Requirements - a statement of any valid knowledge, skill, education, certification, etc., required by the position if it is not readily apparent from reading the description, such as specific contracting certificates, foreign language proficiency, or licensure.

Always include any other special conditions of employment required for the position *e.g.*, Top Secret Clearance, a drug testing requirement, a travel requirement, unusual tour of duty

### CHECKLIST:

#### 1. Major Duties

Does each major duty describe:

\_\_\_\_\_ The work to be performed?

\_\_\_\_\_ The procedures involved in performing the work?

\_\_\_\_\_ The proportion of time spent on each major duty (usually 25% or more of the time)?

#### 2. Supervisory Controls

Does this paragraph include:

\_\_\_\_\_ How job assignments are made?

\_\_\_\_\_ What kind of supervision is received while performing the work?

\_\_\_\_\_ What oral and written guidance is available?

\_\_\_\_\_ How the work is evaluated?

#### 3. Special Qualification Requirements and Conditions of Employment.

\_\_\_\_\_ Are there special licenses/certificates required for this position?

\_\_\_\_\_ Does this position require a drug test? Pre-employment physical examination?

\_\_\_\_\_ Does this position have an unusual tour of duty; require frequent travel?

\_\_\_\_\_ Are selective factors required by the duties of the position? Have you identified them? For example, requirement for foreign language proficiency, specific contracting certifications required.

\_\_\_\_\_ Is this position telework eligible?

#### 4. Performs Other Duties as Assigned:

\_\_\_\_\_ Is this statement at the end of the Major Duties?

## **FORMAT FOR AN FES PD (9 FACTORS)**

The Factor Evaluation System format will cover a large majority of the positions in the Coast Guard. The FES covers all non-supervisory GS positions grades 01 through 15. It is a point-based system with 9 factors. The PD has an introduction then describes the major duties of the position and addresses each of the factors.

I. Introduction - Identify the Command, Directorate, Office, Division, etc.; the position's duty location; the position title; and the purpose of the position.

II. Major duties and responsibilities – Describe the duties that occupy most of the employee's time and are the primary reason for the position's existence.

III. Factors – Address the following nine factors.

Factor 1 – Knowledge Required by the Position

- Kind or nature of knowledge and skills needed
- How the knowledge and skills are used in doing the work

Factor 2 – Supervisory Controls

- How the work is assigned
- Employee's responsibility for carrying out the work
- How the work is reviewed

Factor 3 - Guidelines

- Nature of guidelines for performing the work
- Judgment needed to apply the guidelines or develop new guides

Factor 4 - Complexity

- Nature of the assignment
- Difficulty in identifying what needs to be done
- Difficulty and originality involved in performing the work

Factor 5 - SCOPE AND EFFECT

- Purpose of the work
- Impact of the work product or service

Factor 6 – Personal Contacts

- People and conditions/setting under which contacts are made

Factor 7 – Purpose of Contacts

- Reasons for contacts in Factor 6

Factor 8 – Physical Demands

- Nature, frequency, and intensity of physical activity

Factor 9 – Work Environment

- Risk and discomforts caused by physical surroundings and the safety precautions necessary to avoid accidents or discomforts.

## FORMAT FOR AN FWS PD (4 FACTORS)

This format covers all Federal Wage System non-supervisory positions grades 1 through 15. The PD first describes the MAJOR DUTIES and then addresses four factors identified below.

### 1. Major Duties

Does each major duty describe:

- The work to be performed?
- The procedures involved in performing the work?
- The proportion of time spent on each major duty (usually 25% or more of the time)?

### 2. Performs Other Duties as Assigned

- Is this statement at the end of the Major Duties?

### 3. Are the four factors thoroughly addressed?

#### Factor 1. Skill and Knowledge

- Are the knowledge, skills and abilities required to perform the major duties listed?

#### Factor 2. Responsibility

Does this paragraph include:

- How job assignments are made?
- What kind of supervision is received while performing the work?
- What oral and written guidance is available?
- How the work is evaluated?

#### Factor 3. Physical Effort

- Does this paragraph describe the nature, degree, frequency, and duration of physical exertion required to perform the work?

#### Factor 4. Working Conditions

Does this paragraph cover:

- The hazards, physical hardships, and working conditions to which the worker is exposed?
- The frequency and duration of such exposure?
- The adequacy of protective clothing and safety devices?
- The possible effects on the employee?

Other Considerations: (if applicable)

- Motor Vehicle or Commercial Driver's License Required
- Other License Required
- Safety Collateral Duties
- Drug Test Required
- Special Physical Requirements/Demands

## FORMAT FOR AN FWS SUPERVISORY PD (3 FACTORS)

This format covers all FWS Supervisory positions. The proper standard to use for grading all supervisory positions is the Job Grading Standard (JGS) for Supervisors. The PD first describes the major duties and then addresses the following three factors:

- Factor I. Nature of Supervisory Responsibility
- Factor II. Level of Work Supervise
- Factor III. Scope of Work Operations Supervised

### 1. Major Duties

Does each major duty describe:

- \_\_\_\_\_ The work to be performed?
- \_\_\_\_\_ The procedures involved in performing the work?
- \_\_\_\_\_ The proportion of time spent on performing supervisory work (usually 25% or more of the time)?

### 2. Performs Other Duties as Assigned

\_\_\_\_\_ Is this statement at the end of the Major Duties?

### 3. Are the following factors thoroughly addressed?

#### Factor I. Nature of Supervisory Responsibility

Does this paragraph describe:

- \_\_\_\_\_ How the work of the unit is planned and carried out?
- \_\_\_\_\_ How the unit is directed?
- \_\_\_\_\_ How administrative matters are taken care of?

#### Factor II. Level of Work Supervised

Does this paragraph include:

- \_\_\_\_\_ The complexity of work supervised?
- \_\_\_\_\_ The highest grade of non-supervisory work technically supervised?

#### Factor III. Scope of Work Operations Supervised

Does this paragraph describe:

- \_\_\_\_\_ The variety of positions supervised?
- \_\_\_\_\_ The organizational authority of the position?
- \_\_\_\_\_ The physical dispersion of the work and what coordination is required?

### OTHER CONSIDERATIONS (if applicable)

- [ ] Supervisory Responsibilities (EEO Statement)
- [ ] Motor Vehicle or Commercial Driver's License Required
- [ ] Other License Required
- [ ] Safety Collateral Duties
- [ ] Drug Test Required
- [ ] Special Physical Requirements/Demands

## **HOW TO COMPLETE OPTIONAL FORM 8 (OF-8) MANAGER'S INSTRUCTIONS**

### **WHAT IS AN OF-8?**

The OF-8 serves as a Position Description cover sheet, and is designed to document and certify a position classification decision. This document is intended to assist in capturing and identifying essential position data and requirements.

### **WHEN IS COMPLETION AND SUBMISSION OF AN OF-8 REQUIRED?**

Completion of an OF-8 is required any time a position is classified. New classifications result from the following:

- The establishment of a new position.
- When the major duties of a position have changed since the last official classification decision.
- When the position duties and responsibilities are modified as a result of a proposed reprogramming or position upgrade request.

### **WHO COMPLETES THE OF-8?**

The OF-8 is required to be completed by both the supervisor of the position and the servicing Command Staff Advisor (CSA) or Human Resources (HR) Specialist. The OF-8 is initiated by the supervisor of the submitting office.

### **WHAT PORTION OF THE OF-8 MUST BE COMPLETED PRIOR TO SUBMITTING TO YOUR HR SPECIALIST/CSA FOR CLASSIFICATION ACTION?**

**Block 1: Agency Position No.**

Provide agency assigned position control number (*e.g.*, PCN: 00012345)

**Block 2: Reason for Submission** (check one)

- **“Redescription”** means the duties and/or responsibilities of an existing position are being changed. Document the reason under **“Explanation.”**
- **“New”** means the position has not previously existed.
- **“Reestablishment”** means the previously abolished position is re-activated.
- **“Other”** covers such things as change in title, occupational series, or supervisor without a change in duties or responsibilities (this option is not commonly used).

**Block 3: Service** (check one)

- **Headquarters** – those positions stationed within the immediate Coast Guard Headquarters
- **Field** – those positions stationed outside of the Coast Guard Headquarters

**Block 4: Employing Office Location**

This field is always completed. This is the city and state where the headquarters staff element, headquarters unit or command is located.

**Block 5: Duty Station**

This is the location where the incumbent and the position are located if the incumbent and the position are located different than that listed in Block 4. Provide geographical location (city, state) where the incumbent of position regularly reports for duty (same as the location used for official pay purposes).

**Block 11: Position is (check one)-**

- **Supervisory**

A “Supervisory” position is one that meets the requirements as defined in current OPM [General Schedule Supervisory Guide \(GSSG\)](#) or the [Federal Wage System Job Grading Standard for Supervisors](#).

- **Managerial**

The definition of “Managerial” varies by context and situation. There is no business reason in Coast Guard to use this designation for a position, so do not choose this option

- **Neither**

Position is not supervisory. Positions classified as “leads” are also indicated here.

**Block 12: Sensitivity**

Position sensitivity is determined by application of the OPM designation tool from the OPM website (<http://www.opm.gov/investigations/background-investigations/position-designation-tool/>) in coordination with the manager and HR Specialist. Specify detail for Sensitivity Code 5 and 6 positions in the “Remarks” field (block 24).

Position Sensitivity Code	Type	Security Clearance Required
1	Non-Sensitive or Low Risk	None
2	Non-Critical Sensitive	<b>Secret</b>
3	Critical Sensitive	<b>Top Secret</b>
4	Special Sensitive	<b>Special Compartmented Information</b>
5	Moderate Risk	None
6	High Risk	None

**Block 15: Classified/Graded by**

Complete **Block 15e**. Indicate recommended title, pay plan, occupational code and grade of position.

**Block 16: Organizational Title of Position**

Indicate an organizational, working, or functional position title if it differs from the official title (if needed), such as Chief, Systems Branch.

**Block 17: Name of Employee (Optional)**

Typically left blank.

**Block 18: Department, Agency, or Establishment**

Indicate the various levels of the position's organizational structure and reporting hierarchy, beginning with the Department of Homeland Security as the highest level down to the Division level (if applicable) as the lowest level in the of organizational structure to which the position reports.

For Example:

- 18. Department: Department of Homeland Security
- 18 a. First Subdivision: United States Coast Guard
- 18 b. Second Subdivision: Deputy Commandant Mission Support
- 18 c. Third Subdivision: Shore Infrastructure Logistics Center
- 18 d. Fourth Subdivision: Product Line Division
- 18 e. Fifth Subdivision: Portfolio Management Branch

**Block 19: Employee Review**

Employee signature is optional and not typically annotated.

**Block 20: Supervisory Certification**

The immediate supervisor of the position MUST sign and date **Block 20a**. The signature of a higher-level manager or supervisor in **Block 20b** is optional. If, during the classification process there are major changes made to the position description originally submitted, the OF-8 may be sent back to the supervisor with the classified position description, for recertification.

**Block 24: Remarks**

Annotate whether this is a drug testing position, what level of security clearance is required, and other explanatory information not addressed in the blocks above. Most of the time this block is left blank.

POSITION DESCRIPTION <i>(Please Read Instructions on the Back)</i>							1. Agency Position No. 00021568						
2. Reason for Submission <input checked="" type="checkbox"/> Redescription <input type="checkbox"/> New <input type="checkbox"/> Reestablishment <input type="checkbox"/> Other		3. Service <input type="checkbox"/> Hdqtrs <input checked="" type="checkbox"/> Field		4. Employing Office Location Washington DC		5. Duty Station San Juan, PR		6. OPM Certification No. -IGNORE-					
Explanation <i>(Show any positions replaced)</i>				7. Fair Labor Standards Act <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Nonexempt		8. Financial Statements Required <input type="checkbox"/> Executive Personnel Financial Disclosure <input type="checkbox"/> Employment and Financial Interest		9. Subject to IA Action <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
				10. Position Status <input checked="" type="checkbox"/> Competitive <input type="checkbox"/> Excepted <i>(Specify in Remarks)</i> <input type="checkbox"/> SES (Gen.) <input type="checkbox"/> SES (CR)		11. Position Is <input type="checkbox"/> Supervisory <input type="checkbox"/> Managerial <input checked="" type="checkbox"/> Neither		12. Sensitivity <input checked="" type="checkbox"/> 1-Non-Sensitive <input type="checkbox"/> 3-Critical <input type="checkbox"/> 2-Noncritical Sensitive <input type="checkbox"/> 4-Special Sensitive					
13. Competitive Level Code -IGNORE-		14. Agency Use -IGNORE-		15. Classified/Graded by		Official Title of Position		Pay Plan	Occupational Code	Grade	Initials	Date	
a. Office of Personnel Management													
b. Department, Agency or Establishment													
c. Second Level Review													
d. First Level Review													
e. Recommended by Supervisor or Initiating Office		Lead Airplane Factory Inspection Technician		GS		1803		11		RM		10/31/2013	
16. Organizational Title of Position <i>(if different from official title)</i> Airplane Factory Inspection Technician							17. Name of Employee <i>(if vacant, specify)</i> -IGNORE-						
18. Department, Agency, or Establishment Department of Homeland Security							c. Third Subdivision Base San Juan/GANTSEC						
a. First Subdivision U.S. Coast Guard							d. Fourth Subdivision Facility Operations Division						
b. Second Subdivision Seventh Coast Guard District							e. Fifth Subdivision						
19. Employee Review-This is an accurate description of the major duties and responsibilities of my position.							Signature of Employee <i>(optional)</i> - IGNORE -						
20. <b>Supervisory Certification.</b> I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationships, and that the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that false or misleading statements may constitute violations of such statutes or their implementing regulations.													
a. Typed Name and Title of Immediate Supervisor LCDR Ronald McDonald						b. Typed Name and Title of Higher-Level Supervisor or Manager <i>(optional)</i> CDR Mayor McCheese							
Signature <i>R. McDonald</i>				Date 10/31/13		Signature <i>Mayor McCheese</i>				Date 10/31/13			
21. <b>Classification/Job Grading Certification.</b> I certify that this position has been classified/graded as required by Title 5, U.S. Code, in conformance with standards published by the U.S. Office of Personnel Management or, if no published standards apply directly, consistently with the most applicable published standards.						22. Position Classification Standards Used in Classifying/Grading Position -IGNORE-							
Typed Name and Title of Official Taking Action						<b>Information for Employees.</b> The standards, and information on their application, are available in the personnel office. The classification of the position may be reviewed and corrected by the agency or the U.S. Office of Personnel Management. Information on classification/job grading appeals, and complaints on exemption from FLSA, is available from the personnel office or the U.S. Office of Personnel Management.							
Signature				Date									
23. Position Review		Initials	Date	Initials	Date	Initials	Date	Initials	Date	Initials	Date		
a. Employee <i>(optional)</i>		--	-IGNORE-	--	-IGNORE-	--	-IGNORE-	--	-IGNORE-	--	-IGNORE-		
b. Supervisor		--	-IGNORE-	--	-IGNORE-	--	-IGNORE-	--	-IGNORE-	--	-IGNORE-		
c. Classifier		--	-IGNORE-	--	-IGNORE-	--	-IGNORE-	--	-IGNORE-	--	-IGNORE-		
24. Remarks													
25. Description of Major Duties and Responsibilities <i>(See Attached)</i>													

## **OTHER ITEMS REQUIRED WHEN SUBMITTING A PD**

- Signed OF-8
- A Standard Form 52 (SF-52) Request for Personnel Action (such as upgrade/promotion/recruitment)
- Organization chart indicating the location of the position, and any positions it supervises, and which position supervises the one under review
- Functional statement
- A reprogramming [e.g., OMR, SARR, etc] memorandum if applicable

## **WHO TO CONTACT**

A complete listing of servicing Command Staff Advisors and HR Specialists is available on the CG Office of Civilian Human Resources (CG-121) website and can be viewed at <http://www.uscg.mil/civilianhr/contact.asp>.